Master's Degree Thesis

AN APPLICATION OF PUBLIC OPINION MEASUREMENT PRINCIPLES

Robert K. Norse

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Thesis

AN APPLICATION OF PUBLIC OPINION MEASUREMENT PRINCIPLES

BY

ROBERT KENSINGTON NORSE

(B.S. in B.A., Boston University, 1947)

Submitted in partial fulfilment of the

requirements for the degree of

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I know where there is more
wisdom than is found in
Napoleon, Voltaire, or all
the ministers present and
to come -- in Public Opinion.

.....Talleyrand

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INTRODUCTION

Many prominent practitioners feel that the recent book, "Your Public Relations", by Glenn and Denny Griswold*, is one of the most authoritative works yet published concerning the field of Public Relations. On page four they write:

> Out of all these definitions (referring to a recent survey in which 2,000 of the leading public relations executives and practitioners of the country submitted their definition of public relations) and out of our experience in the field, we have distilled the following as our concept of a definition broad enough to cover the whole function and concise enough to guide any plan or program:
>
> Public relations is the management function which evaluates public attitudes, identifies the policies and procedure of an individual or organization with the public interest, and executes a program of action to earn public understanding and acceptance.

The authors continue, on page eleven, to say that

> Business is developing a sincere and frequently apprehensive awareness of the importance of what the public thinks. Out of that concern has developed a broad expansion in the use of public opinion research and a general recognition of that fact that public attitudes can and must be measured accurately before specific policies are evolved and definite programs projected.

With the field of Public Relations apparently expanding, it seems certain that there will be even more need for public opinion measurement, thereby enhancing its significance. This need is underscored by its immediate status.

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* Published by Funk & Wagnalls Co., N. Y., 1948

Since the 1948 Presidential election polls there has been a large volume of criticism leveled at opinion measurement; there is a possible danger of widespread non-acceptance of this function essential in so many aspects of management in our present-day society. Furthermore, the failure of these polls to predict correctly the outcome of that election indicates a need for improved public opinion measurement resources.

Because of the dynamic nature of public opinion, its measurement may never reach the degree of authenticity found in more exact sciences, such as mathematics. However, that does not preclude the definite possibility of training specialists and developing procedures and techniques that will assure the attainment of increasingly acceptable areas of accuracy. Clearly, the nation's educational institutions are a suitable source for development. There, through proper supervision, a core of qualified personnel can be trained to maintain and advance public opinion measurement.

Intellectual comprehension of this subject is a basic necessity. But this alone does not insure effective performance; the art of doing must also be learned. In various fields it is being realized that just as it is possible to teach students how to think, using facts and theory, it is possible to teach them how to act effectively through the personal application of their knowledge in concrete situations.

The purpose of this thesis is to describe how, with a knowledge and understanding of certain basic principles, a class of undergraduate college students developed and executed a public opinion measurement project, using the city of Boston as an "experimental laboratory".

Part One consists of the organization of a logical sequence of "areas of concentration" believed by the author to be fundamental to the operation of almost all measurements of public opinion.

Part Two is the portrayal of the development and execution of these principles by the students.

PART ONE

SIX FUNDAMENTAL AREAS OF CONCENTRATION

IN

PUBLIC OPINION MEASUREMENT

Through study and personal experience, the author has found it useful to organize public opinion measurement projects into six successive steps.

These areas of concentration, in brief, are:

1) Definition of the problem, in which the specific objectives of the survey are mutually understood and agreed upon by both the director and the sponsor of the survey. These objectives can be determined through a process of analyzing the situation and making a preliminary investigation of it.

2) Opinion communication, involving the selection of an appropriate channel of communication to use in gathering the necessary opinions.

3) Question design, a process of effectively wording the questions to be asked, properly organizing them on the questionnaire, and testing the questionnaire to discover any faults or obstacles prior to launching the survey.

4) Sampling, which is the procedure of determining the quality and quantity of people necessary to reveal the sentiment of a group (universe).

5) Interviewers, involving the selection, training, supervision, and incentives essential to a staff of competent, efficient interviewers.

6) Tabulation and interpretations of results, whereby the information collected by the interviewers is enumerated, classified, presented in a report, and interpreted.

The remainder of Part One is devoted to an elaboration of the above steps with references to pertinent sources.

1) DEFINITION OF PROBLEM

The underlying purpose of every assessment of opinion is to solve some kind of problem. It may be the very simple problem of finding out what a friend thinks of the "new look" in women's clothes, or it may be the very complex one of determining nation-wide sentiment concerning a highly controversial labor law. Whatever the subject of the opinion study may be, it is born of some problem or need.

It follows, therefore, that the first area of concentration in opinion measurement is a consideration of the problem at hand. Undoubtedly, a large amount of time, energy, and money is wasted each year on ill-defined surveys. "Problems" are sometimes measured which do not require measurement; other real problems fail to be solved because of lack of adequate definition which results in the wrong factors being measured; and still others are doomed from the beginning because they are not defined specifically enough to permit meaningful analysis.

No public opinion survey should be undertaken until the one who needs the survey and the one who is to conduct the survey arrive at mutually acceptable and understandable concrete objectives. One procedure (1) for achieving this, generally accepted in the field today, consists of the following three steps:

A) Situation analysis. This is a determination of pertinent knowns and unknowns which may be of value, in the light of the need or problem, in determining the objectives. It may involve the securing of existing information and data pertinent to the problem (available from such sources as libraries, governmental records, etc.). One precaution must be exercised here; all information and data from secondary sources must be

examined to determine if it is sufficiently up-to-date.

The situation analysis sometimes changes the concept of the problem, resulting in a much more effective study*.

B) The informal investigation. This consists of a preliminary questioning of a number of respondents similar in nature to the final sample of people believed to be required (3). From this questioning it is often possible to define more accurately the essence of the problem. An open-end interviewing process is involved, requiring the exercise of certain skills conducive to this type of operation (Appendix A). The individual in charge of the research project is the one most often qualified to undertake this phase since he will probably have the most interest and experience and be intimately acquainted with the problem.

C) Statement of objectives. It is now possible to state the objectives of the survey in a specific and concise manner, an example of which is shown in Appendix B. This step marks the transition of the study from the vague, broad concept to the specific, clarified concept.

The American Marketing Society (7) has summed up this first area of concentration very appropriately:

> This . . . represents that most important <u>deliberation before action</u> which is needed to clarify with precision the aim of all the work that is to follow. It should, therefore, be entered upon with circumspection, as the master step of the entire project - in order that both the <u>purpose</u> and the <u>range</u> of the study may be

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* One advertiser (2) sought concrete evidence that his radio program was definitely contributing to the sale of his product - an expensive luxury. The agency appreciated the difficulty of "proving" that a particular campaign sells goods, and in addition it had the broader point of view that the program was really designed to build up prestige and goodwill for the client. Discussions revealed his interest in measuring listener reaction, so the problem was reformulated.

defined with the greatest possible realism and practicality.

A graphic way of describing the key nature of this step is to compare it to the action of a trained fireman arriving at a blaze. Quite unlike the UNtrained person whose inclination is to dash into action immediately and "do something", however vague or ill-considered or dangerous, the trained fireman stops first of all to consider what his immediate, practical objective shall be. The really important first objective may be to rescue human beings; to turn in a general alarm; to shut off the gas main; to concentrate on preventing the blaze from reaching adjoining property; or, perhaps, merely to close certain doors and windows in order to cut off the draft.

The cool attention the trained person gives to deciding upon a precise objective, as he stands for a brief interval seemingly idle, may be the decisive factor in a situation on which much depends.

2) OPINION COMMUNICATION

At the present time, four basic channels may be used to communicate the nature and extent of a public's opinion to the fact-gathering agency. It must be remembered, however, that at different times and under varying circumstances, the advantages and disadvantages of each channel govern its effectiveness (Appendix C).

Channel One - The Personal Interview

This is the most popular channel and involves a face-to-face contact; the interviewer personally talks with and questions the respondent. In the hands of those who are skilled and well-trained in the art of interviewing, this process proves successful in obtaining information that is usually more extensive, reliable, and penetrating than that derived through other channels.

Channel Two - The Mail Interview

The mail interview is the "shotgun method" of getting information as contrasted with the "rifle method" of the personal interview. A few dozen, or a million or more, questionnaires may be shot out, as it were, through the mails to a corresponding number of persons, from whom it is hoped a fair measure of response will be secured - one at any rate that will serve as an adequate and reliable sample of the population that is being studied.

Very rarely will the number of replies to a mail survey exceed twenty per cent of the total number of ballots posted, and if as many as ten per cent of the addressees respond, the analyst can consider the response was equal to, and perhaps even above, the average for this method of collecting data, although it can be increased by either offering or

sending along a premium*.

Channel Three - The Telephone Interview

The telephone interview has played a significant and increasing part in the gathering of information which requires only a few brief and simple questions answerable by "YES" or "NO" or by some other equally short and precise reply. This is the simplest channel and, in certain cases, the most effective. It consists of having interviewers sit at telephones, dial numbers, and ask questions of the respondents.

Channel Four - The Panel Interview

This might very well be considered a sampling method by virtue of the fact that a group of people are carefully selected and solicited to cooperate with the interviewer in a series of interviews over a long period of time. However, it does possess certain problems in the realm of communication, and is included here. Because the same selected sample can be periodically interviewed on the same topic, the Panel Interview has tremendous possibilities, but also some special shortcomings, as an intensive measuring device.

Personal Call-Back Interview

In addition to the four basic channels of communication, the author here suggests a type of "hybrid channel" in an attempt to combine the most desirable features of the mail and personal interviews.

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* It is reported that the Broadcast Measurement Bureau, in its nation-wide radio station coverage study, sends along a premium with the questionnaire - and they insist upon a fifty per cent return.

On surveys composed of relatively simple questions, answerable by a "yes" or "no" or very short statements, a group of interviewers would distribute the questionnaire with envelopes to a certain number of homes and/or establishments. They would explain that rather than interrupt the person at the moment, they would leave the questionnaire to be answered at leisure and sealed in the envelopes. Later (that evening or the following day), the interviewers would call back for the sealed envelopes. If the opinions of a certain person were desired, such as those of the husband in the house or the office manager of the establishment, and they were not present at the initial calling, the person contacted would be requested to see that these designated respondents received the questionnaire and envelope. All ballots would include a brief note of explanation, of course.

Such a system would have several advantages. The respondent would be more apt to express an honest opinion in this type of secret interview*; a greater number of people could be reached in the same amount of time required for the usual personal interview survey; there would be a much greater proportion of returns than in a mail survey; since the questionnaires would be <u>delivered</u> by the interviewer, the project would conform quite closely to the desired sample; and in the case of those people who refused to answer the ballot, the interviewer could ask the reason for their not doing so.

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* For an example of the effectiveness of the "secret ballot" technique, the reader is referred to Appendix D.

Obviously, this channel would not operate effeciently in surveys involving long, complicated questions requiring explanation. Furthermore, it could not be put to its most suitable use in a survey requiring but a small number of people in the sample. However, within the limits described, the Personal Call-Back Interview system might well prove to be an effective channel of communication.

3) QUESTION DESIGN

A writer once dreamed of a Utopia in the year ten thousand, in which speech no longer existed and people merely read one another's thoughts (9). Until that time, however, we shall have to continue evolving people's thoughts and opinions by asking them questions.

Three vital elements, each contingent upon the other, constitute this area of concentration: 1) the initial construction of the question; 2) the proper blending of the questions into a questionnaire; 3) the testing of the questionnaire in an actual situation.

Initial Construction of the Question

Every question that is used to discover opinion is related to one of four basic types:

1. The dichotomous (yes or no) question.

A very popular and widely used type of question, it is simple to answer and easy to tabulate.

Does Centerville need a new Town Hall at the present time?

YES ☐ NO ☐

2. The intensity question.

This type is more difficult to tabulate, but has the distinct advantage of revealing the depth or intensity of feeling that the respondent has on the topic.

The need for a new Town Hall in Centerville at the present time is:

Very great ☐ Great ☐ Moderate ☐ Very little ☐ No need at all ☐

Please check one of the above

3. The open-end (discussion) question.

Generally speaking, the use of skilled interviewers makes this the most valuable type of question from the standpoint of discussing, discovering, and measuring relatively valid opinions. Its drawbacks are expense and great difficulty in tabulation, both of which increase in direct proportion to the size of the survey.

What do you think of the idea of Centerville having a new Town Hall at the present time?

4. The alternate choice question.

This type is fairly simple to tabulate and permits critical comparison among a homogeneous group of respondents.

If Centerville could have ONE of the following at the present time, which ONE would you choose?*

- ☐ A new firehouse
- ☐ A new High School building
- ☐ A new Town Hall
- ☐ A new library

There is no universal formula for the wording of questions to determine public opinion. There are available, however, certain "guiding suggestions" for the formation of questions to be used in opinion measurement. Even some of these are vulnerable to criticism since new refinements continually tend to out-mode them. For example, one textbook published in

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* This question might also be worded, "If Centerville could have ONE of the following at the present time, which ONE do you think is the most necessary?"

the year 1929 (10) covered this all-important area in seven pages, devoted almost entirely to such (now) relatively trivial topics as "Frequency of Number of Questions in Mail and Personal Interview Questionnaires"; "Men vs. Women Interviewers"; and "Should the Questionnaire be Shown?"

In recent years, much has been added to this area as a result of discovery, trial, and application. The latest developments in question-phrasing center around five points.

First, the creation of rapport (explained more fully in the next "element") and interest through the introduction and first questions is a prerequisite to the successful determination of the respondent's opinion. Without his goodwill and interest there is a great risk of obtaining hurried, inaccurate, and inconsistent replies.

Second, the wording of the question must be specific and in common use among those being interviewed. Questions should permit but one interpretation. A nation-wide ginger ale brand preference survey, for instance, should not include the question, "What brand of tonic did you last purchase?" The word tonic may mean ginger ale in New England, but in the "Deep South" it could mean anything from hair oil to a liver bile medicine*.

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* Questions should also be reasonably simple to answer. On a consumer research survey (11) to determine the average annual beer consumption per capita, the question, "How much beer do you drink in a year?", would result in an inaccurate figure, since the average person would experience difficulty in the computation. To obtain a more valid estimate, the following two questions were asked at various seasons of the year: "How much beer did you buy on the last purchase?", and, "When, how long ago, did you last buy beer?"

Third, questions should be concerned with estimating behavior. Public opinion means very little until it is translated into action. The public relations practitioner strives to gain public acceptance for his client's product or service which will motivate that public to profitable action. Consider the case of a proposed radio station planning to launch a policy of day-long uninterrupted music. It would be possible to measure the sentiment of people toward such a proposal, true, but how much more valuable it would be to measure the response to a question like, "Would you be willing to pay an annual fee for the privilege of hearing this station on your radio?"

Fourth, the context of the question must not damage or endanger the self-esteem of the prospective respondents. The direct question, "Have you read Inside the U.S.A.?", asked of a person who had not read it, would often be answered in the affirmative to escape embarrassment. When the question is reworded, "Do you intend to read Inside the U.S.A.?", the respondent is given a chance to protect his pride; if he has not read the book he is allowed to claim that he intends to, revealing a valid answer to the interviewer.

Fifth, questions must be worded so as to eliminate emotion, prestige suggestion, and bias. The query (12), "Do you like President Roosevelt's idea of having Thanksgiving a week earlier this year?", was put to two thousand people, of whom 428 replied "Yes". When the same interviewers asked two thousand other people (having the same characteristics of the first group) the question in this form, "Do you like the idea of having Thanksgiving a week earlier this year?", only 334 of this second group

replied in the affirmative.

One of the leaders in the field (13) made the following experiment. Two questions were asked: (a) "Should every worker be forced to join a union?", and (b) "Is it proper for a union to require all wage earners in an industrial enterprise to join the union

_____ under any circumstances

_____ when the union controls a majority of the employees

_____ when it controls a minority of the employees

_____ improper under any circumstances."

Under the first wording, 88.9 per cent were completely opposed to unionization, but under the second, only 45 per cent were completely opposed. The 'emotional word' force was omitted in the second question; in addition, specific options made it simpler to answer "Yes".

The Proper Blending of the Questions into a Questionnaire

After the questions have been constructed they must be arranged on a questionnaire. Although no 'hard and fast' rules control this arrangement, a few general principles are considered fundamental (14).

The opening question must create rapport. The list of questions should always be carefully considered from the standpoint of interest. Those which seem to have greatest appeal should be tried at the start of the questionnaire, but the introductory question should not be one of the really vital issues of the study. This first question of the interview is at a disadvantage. It is acting as an "ice-breaker" designed to secure the cooperation of respondents. A large proportion of those answering will not yet be in the proper mood for replying, so will, at the start, be

unprepared for almost any question that might be asked.

The first few questions should be simple. Some survey organizations make it a point never to ask any but straight "Yes - No" questions at the start. This type question appears simpler to the respondent than one which calls for a reply in his own words. On the other hand, if a difficult question is asked at the beginning, a large proportion of respondents reply, "Don't know", and others refuse to continue with the interview*.

The opening questions must be ones on which respondents can and will express themselves. The person who has difficulty answering the first few questions may feel that doubt is being thrown upon his intelligence. If he does continue, he may give false or facetious replies to bolster his ego.

Questions of little interest to the respondent should be placed well in the body of the series. These should be surrounded by questions of higher interest value to "keep the interview going".

Questions should be arranged psychologically on the ballot, or asked in psychological order if it is a personal interview. To explain this, the reader is asked to read the following paragraph just once and come out with the correct answer.

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* In one study (15) the first question was, "What do you consider the outstanding business and secretarial school for women?" It was a difficult question, and there was also a belief on the part of those interviewed that the field worker was attempting to sell a business course. The question did not meet either of the first two criteria in this section, so it is not surprising that some fifty per cent of those who did reply said, "Don't know". Interviewers also reported difficulty in persuading interviewees to continue with the remaining questions on the ballot.

The Western Limited started from Philadelphia with five passengers in the club car. At Overbrook, three of these got off, and four more got on. Then at Paoli four got off, and two more came on. The train stopped for a moment at Downington, where no one got off, but two people boarded the train. At Parkesburg three persons got off. At Christiana three got off, and one got on. When the train arrived in Lancaster, two more got on, and one got off.

How many stops did the train make? (16)

You are an exception if you got the answer to this one on the first reading. Your thinking was misdirected. Your chain of thought was set up along other channels.

The respondent's thoughts must be set up in such channels that unbiased and meaningful replies will result. The primary problem in the assembly of the questionnaire is to list a set of questions which is not too long, and arranged in an order which makes sense to the one who is answering them. If the questionnaire is too long, thoughts of the respondent may be lost. If the arrangement of the questions is poor, the person answering is forced to skip around with his thoughts, and the replies are not likely to be meaningful. Whether motives, opinions, or actions are being measured, one question should lead to the next in a way that establishes a train of thought*.

The Quintamensional Plan of Question Design

One of the most important advances in the field of question design can be accredited to Dr. George Gallup. He calls it "The Quintamensional Plan of Question Design"(18). This plan provides a practical way for

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* A more intensive treatment of this subject can be found in the book, "The Technique of Marketing Research"(17).

polling organizations to probe five aspects of public opinion on issues of the day. It answers the most frequently voiced criticism of those polling techniques which deal with questions.

Specifically, the quintamensional design makes possible the exclusion of all persons who, in the case of any given issue, "don't know what they're talking about". Through the use of filter or information questions, the opinions of persons representing all levels of knowledge on the issue can be ascertained. The opportunity of correlate opinions with the extent and type of information possessed by those included in the survey opens a new door to the study of factors which influence public opinion on important issues of the day.

Not only are the advantages of open questions and specific or dichotomous questions preserved in the design, but the inclusion of other points of reference which the design itself provides makes possible a more accurate interpretation of answers to both types of questions.

A more thorough probing of the reasons why persons hold the views they do is provided for in the design. And lastly, evidence on the intensity with which majority and minority opinions are held is an integral part of the question-asking.

What is perhaps the most important of all, information obtained from probing the five aspects of public opinion included in the quintamensional plan can all be intercorrelated, with a consequent wealth of data by which public opinion on practically any issue of the day can be described.

Here is an example of how this plan operates:

	Issue: Filibusters in Congress
Filter Question	Will you tell me what a "filibuster in Congress" means to you?
Open Question	What, if anything, should Congress do about filibusters?
Dichotomous Question	It has been suggested that the Senate change its rules so that a simple majority can call for an end to discussion instead of a two-thirds majority as is now the case. Do you approve or disapprove of this change?
Reasons Why	Why do you feel this way?
Intensity	How strongly do you feel about this - very strongly, fairly strongly, or not at all strongly?

The Testing of the Questionnaire in an Actual Situation

We now come to the "laboratory" phase of this area. The questions are tested under the actual conditions expected to exist in the field. The larger the number of people to be queried, the greater is the need for making sure that every reasonable provision has been made to insure a successful response.

In analyzing the preliminary test returns, the following are the principle factors to be considered.

Does the questionnaire get the desired information?

Does the information come back in a form that is suitable for tabulation?

What additional information, if any, should be obtained?

Is there any "dead wood" among the questions that can be eliminated?

By the alternate process of testing and revising, the questionnaire is successively improved until the investigator is satisfied that it fulfills the conditions set forth in the plan of the survey.

4) SAMPLING

The theory and practice of sampling, considered by many to be the most critical phase of the survey technique of public opinion measurement, is constructed on a large foundation of knowledge derived from sampling techniques utilized in many fields. The development of this scientific method has been most marked in the fields of statistics, sociology, and public opinion measurement, and has resulted in a substantial accumulation of knowledge through the years. The discussion at hand, however, is confined to those principles and factors relevant to the Case Study in Part Two*.

A) There is always a "universe" (the <u>whole</u> group of people being studied) from which a consensus of opinion must be obtained. (In the Case Study, the universe is composed of all the registered voters of the city of Boston.)

B) The opinions of this universe may be gathered in two ways.

1) A complete <u>census</u> may be taken (in which every registered voter of Boston would be queried). As is the case in most public opinion surveys, such a procedure is impractical.

2) A <u>sample</u> may be constructed, composed of a few people in the universe, whose opinions are considered to be sufficiently representative of all the people in that universe.

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* The reader who desires a more extensive discussion of sampling is referred to Appendix E, where a statistician, a sociologist, and a public opinion analyst present their interpretation of this subject.

C) All samples are constructed on one of two basic foundations.

1) A random sample, giving each person in the universe an equal chance of being selected.

2) A selective sample, in which certain characteristics of the universe are known in advance, and the sample is so selected that the distribution of these characteristics is similar to proportions of the total population possessing such features. However, it is necessary to select only those characteristics which are expected to exert some influence upon the replies. (The characteristics considered most important in the Case Study are those of sex and political party affiliation. The actual proportion of men and women registered voters of the city of Boston is maintained in the sample. Also, the actual proportion of Republican, Democratic, and Independent voters of Boston is reflected in the sample.)

D) Two methods for the design of the selective sample are those of "specific assignment" and "quota control".

1) The method of specific assignment involves the interviewing of qualified individuals selected by the polling agency. This permits a rigid control of the sample insofar as the investigator is assigned specific people to interview - this permits but little chance to deviate from the original sample.

2) The method of quota control, on the other hand, involves the interviewing of qualified groups (quotas) selected by the polling agency. Under this system, the investigator may interview anyone in the universe, or designated geographical areas thereof,

who meets the qualifications of the quota*.

It is of paramount importance that the make-up and characteristics of both the universe and the sample be properly identified. If they are not, the chance of successful prediction is lessened**.

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* This practice is adhered to in the Case Study. Each student is assigned a quota of respondents, such as:

12 Males		3 are to be Republicans
	of which	10 are to be Democrats
9 Females		6 are to be Independents

This is the quota which the student must fill. It was not considered feasible to require an integration of sex and political affiliation to the characteristics of age and economic status. This was accomplished in the subsequent tabulation (Exhibit Thirteen).

** At this writing the possibility exists that the failure of the major polls to accurately predict the outcome of the 1948 election lay in an improper definition of the universe. An authority on public opinion research has advanced an interesting hypothesis, which, if substantiated by the results of current tests, may very well form a new pattern for political polls (Appendix F).

5) INTERVIEWERS

The work to this point has been carried on by the survey director, possibly with the aid of a small planning staff. But the survey machinery which is now ready to be put into operation demands a staff of interviewers. This problem in public opinion measurement involves the same basic considerations that are to be found in almost all types of business; the solution depends upon the effectiveness of four basic factors.

A) Selection

Such factors as previous experience in opinion measurement, neat appearance, pleasing personality, and effective and convincing speech are carefully weighed by a survey director during his selection of a staff of interviewers. He fully realizes that faulty interviewing can ruin even the most adequately prepared survey, and that the above factors are the traits and characteristics most often found in satisfactory interviewers.

What this writer considers to be the cardinal principle governing the employment of any interviewer appears not to be stressed in the textbooks. Each interviewer must possess the ability to adapt his personality to that of the respondent. Any interviewer who can "fit" into a conversation with either a coal miner or a corporation president is a most valuable asset. The object of the personal interview is to set up and maintain a respondent-interviewer flow of ideas and opinions, and experience has proved that this is achieved most effectively when the similarity of personalities is closest. Such a condition creates confidence and ease on the part of the respondent which is excellent soil for the rapid growth of sincere cooperation.

B) Training

The most suitable type of training for the potential interviewer is on-the-job training. After a few weeks in the central polling office, where he "gets his bearings" and sees how the work of the interviewer fits into the over-all scheme of things, he should be sent out to the field with an experienced veteran of this art. There, he is able to observe first-hand the techniques employed in various types of projects, so that when he has completed his training period he is fully aware of, and well-versed in, all of the significant aspects of interviewing.

In the case of large polling organizations, the establishment of a two- or three-week intensive course, stressing both theory and practicum, is a sound investment. Not only is the training concentrated, it also provides an excellent "screening device" for utilizing the strongest points and abilities of each trainee.

Probably the most widely used method of training is that of mailing small booklets to newly-appointed interviewers. Many of these booklets contain a skillfully prepared, comprehensive text of the entire field of interviewing, placing special emphasis on the particular procedure followed by the organization sponsoring the booklet (23). This is a satisfactory method provided the interviewers have been properly selected, because it reduces expense and explains exactly what is wanted in identical language to all interviewers.

C) Supervision

The ideal method of supervision is through face-to-face contact between survey director and interviewers. This is often impossible, unfortunately, especially in large-scale projects, but can be circumvented

by having the survey director appoint and personally train a sufficient number of assistants, who in turn will personally train the various interviewers. This chain of personalized command is practically essential in a field dealing so much with people. In no case should a "Letter of Instructions" be lightly substituted for personal contact. If the type of survey at hand lends itself to mailed instructions, these should undergo a pre-test in much the same manner as the questions do for the purpose of assuring a correct interpretation by all of the instructions.

D) Incentive

In the judgment of the author, there is no direct relation between amount of pay and amount of accuracy on the part of the interviewers. One of the most effective ways to increase interviewer accuracy is to apply one of the principles demonstrated in the Hawthorne Experiment (24): make the interviewer realize that he and his work are important. If this is done with some degree of imagination in an effective manner, the chances are excellent that he will make his contribution to the project more acceptable.

The method of renumeration will depend, in large part, upon the nature of the survey. A prevelant practice is to pay the interviewer so much per interview, which supposedly provides an incentive to work faster and accomplish more. It must be remembered, though, that hasty work often results in careless errors.

On the other hand, the payment of so much per hour, or per day, might cause the interviewer to waste time in the absence of pressure. It is the author's opinion that neither of these methods should be used singly. Ideally, a combination of both would be in order: a basic minimum

per time period and a bonus, either upon completion of a quota or for each interview in addition to the initial quota. This system would preserve the good points of both methods.

6) TABULATION AND INTERPRETATION OF RESULTS*

After the interviewing is completed, the information that has been accumulated must be "processed". This usually involves three broad steps.

A) Centralization of Data

The first step deals with the task of transferring the replies from the numerous ballots or questionnaires to various classified master sheets. In most cases, each master sheet contains the total expressed opinion on a corresponding question on the ballot. In smaller surveys this transfer and consolidation of information is done by hand, but in the larger public opinion studies there is an ever-increasing tendency toward the use of machine tabulation. Undoubtedly, the "closed-end" type of question is the most adaptable to this type of processing; speed and accuracy result that cannot be matched by hand tabulation. However, machine tabulation is difficult to use on most "open-end" (discussion) questions.

B) Presentation of Data

This step concerns the construction of the final report. The chief consideration here is, "What is the most effective way to describe the results: editorially, graphically, pictorially, or in some other manner?" A knowledge of basic statistical principles is essential to a well-prepared report. So important is this phase of a survey, that sev-

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* This duo-area is treated more fully in Appendix F.

eral of the larger organizations have an entire department assigned to the handling of all statistical responsibilities. The final report is a series of "elaborated summaries", based on the total replies to each question on the questionnaire. Each "elaborated summary" must tell a complete, yet concise, story.

C) Interpretation of Results

The ultimate goal in every measurement of public opinion is the successful appraisal and interpretation of results. A step requiring great skill and knowledge, it is not to be taken lightly. Many market research practitioners are of the opinion that this responsibility should be in the hands of those who sponsored the survey, their contention being that their ability lies in the realm of gathering and tabulating the information, not in interpreting it. This may hold true for certain types of market research, although certainly not for all. In any case, those conducting the survey are responsible for an analysis and interpretation of the results in the light of the information obtained, along with recommendations for possible policy change.

In opinion research, as differentiated from market research, gathering and tabulating the data is only 'half the job' - its interpretation and analysis is the main objective. Assuming that the opinion measurement is conducted as a step in the development of a public relations program, this analysis and interpretation of results becomes the embryo of the public relations program.

PART TWO

DEVELOPMENT AND EXECUTION

OF

CASE STUDY

The Case Study described on the following pages was conducted during the Fall of 1948 by a class of approximately eighty students enrolled in the course "Public Opinion and Propaganda", in Boston University's School of Public Relations.

The majority of the students were third year college undergraduates, while a few were Seniors and Graduate Students. What was originally intended to be a small-scale project for the class, developed into a statistical investigation and analysis of some proportions in the field of public opinion measurement.

It was not evident at the start, but as the project continued it became more and more apparent that the material for a case study was being created that could very effectively be adapted for use by future classes in that and similar courses.

The desirability of such an adaptation was brought vividly to light by the participating students themselves in their critiques of the project at its completion. They were unanimous in their remarks that the venture had changed the direction of the course from one of strict academic, theoretical pursuit, to one that included the all-important "practical experience in a living situation"; and that the project had contributed more to their understanding of public opinion measurement than any other phase of the course to date.

These factors would seem to warrant the recording of the essential experience of the college group into a more or less formal case study which might contribute to the conduct of a similar project in the future.

PUBLIC OPINION MEASUREMENT

A Case Study

Performed on October 20, 1948, by the
"Public Opinion and Propaganda" class

Boston University, School of Public Relations

THE PROBLEM

The problem was selected by the author in advance of the enrollment of students in the course so that certain essential preparations could be made. Because of the timeliness of the 1948 political campaigns, it was decided to conduct a survey as follows:

Obtain a concensus of opinion from the voters of Boston which reflects their present sentiment toward the following:

1. The Presidential Candidates
2. The Gubernatorial Candidates
3. The Three Labor Referenda

From the results, attempt to indicate the outcome of the above on Election Day.

PLANNING AND PREPARATION

Mid-summer marked the first stages of development. In order to achieve the results of adequate instruction and experience for the students, certain major decisions were worked out ahead of time and later explained to the students.

Opinion Communication

The personal interview method was chosen for the experience it would offer the students.

Question Design

It was decided that the questionnaire would be composed of dichotomous-type questions, one of the most suitable types for unskilled interviewers.

Sampling

The method of "Quota Control" was selected because of its effectiveness in situations of this nature.

Statistical Picture

The "Statistical Picture" of the city of Boston appears in Exhibits One, Two, and Three; all of the information therein was acquired from the Election Department at Boston's City Hall. More up-to-date figures were gathered as they became available to insure as accurate a picture as possible at all times (the original figures were obtained in August, but registration of new voters was to continue until mid-October).

Achievement Schedule

When the scope and nature of the problem was finally realized, all the activities involved in the survey were planned in sequence and set down on what was called in this instance an "Achievement Schedule", namely, a complete list of all tasks and their deadlines connected with the survey (Exhibit Four). As each task was accomplished and each deadline met, they were crossed off the schedule and the staff's efforts renewed in the direction of the unfinished portion.

ORGANIZING AND STAFFING

Organization

The first consideration in this phase of the problem was the development of a clearly defined Organization Chart, the extent and form of which is usually determined by 1) the nature and/or complexity of the problem and 2) the availability of skills necessary for its successful solution.

The Organization Chart for this survey appears on the following page. Mimeographed copies were subsequently distributed to all participants in the poll, at which time the duties and responsibilities of all were explained. This procedure permitted a common understanding of everyone's function in the project.

Selection of Staff

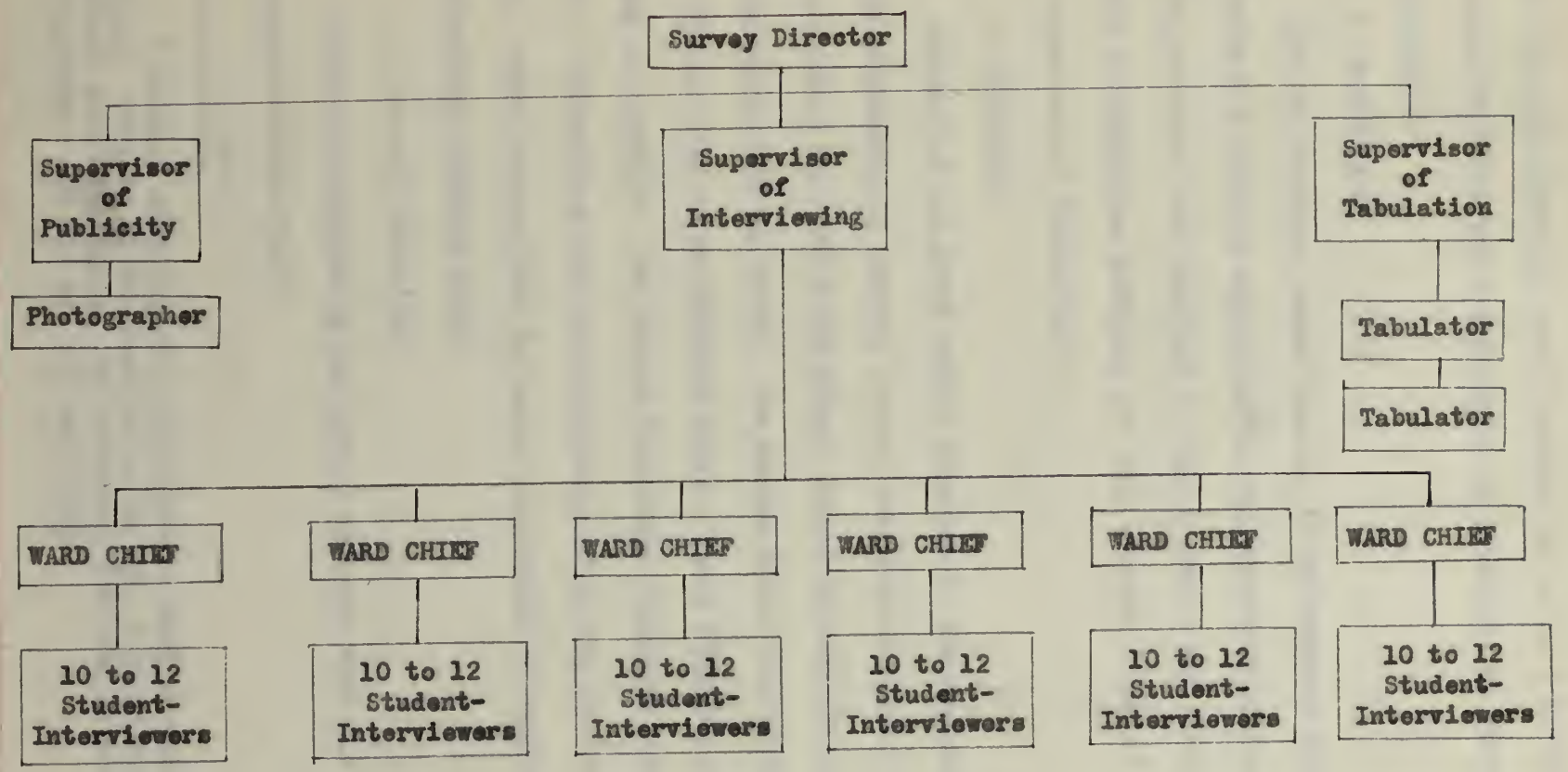
The selection of the administrative staff went hand in hand with the formation of the Organization Chart. (The scope and divisions of the Chart vary with the project under consideration, but the quality and the ability of the complement should always be the finest obtainable.) Since this was solely a class project no outside aid was solicited; the staff members had to be drawn from the student body, the bases of selection being previous experience, ability, and degree of interest.

It was obvious from the start that this venture would require four spheres of administration.

1. Interviewing

At the first session of class in September, seven students with previous interviewing and survey experience were chosen to form the Interviewing sphere of administration; six acted in the capacity of "Ward Chiefs", while one was appointed "Supervisor of Interviewing". Each "Chief" had charge of either three or four wards. The "Supervisor", working with the Director, coordinated the efforts of the "Ward Chiefs". The majority of students worked as interviewers under the direction of specific "Ward Chiefs". The possibility that a few students would be absent because of sickness was handled by recruiting volunteers who agreed to complete two sets of interviews in case some unforeseen emergency

ORGANIZATION CHART



arose*. In just about all public opinion surveys, a division of duties and responsibilities and a delegation of authority is essential to efficient operation.

2. Tabulation

Also at the first class session, three students with a knowledge of statistics and previous experience in the operation of business and calculating machines were selected to form a small, well-knit unit to set up a system of tabulation suitable for this project. One of these was appointed "Supervisor of Tabulation".

3. Publicity

Because of the great public interest in the approaching election and the comparatively unusual type of educational project to be performed, it was decided that the class effort should be publicized, both through the newspapers and the radio. The Boston Sunday Herald agreed to publish two articles, one as an advanced feature story (Exhibit Five) and another showing the results. The Boston University Publicity Bureau released a story to the various wire services, and, after the election, a final story. Radio station WHDH in Boston cooperated by granting a "spot announcement" (Exhibit Six).

4. Over-all Direction

This was provided by the Survey Director with the cooperation of the Administrative Staff.

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* Another emergency was anticipated - that of running out of vital supplies. Because of the deadline to be met, a large amount of necessary materials were maintained. For instance, for 1500 interviews, 4000 ballots were printed - and all but 200 were used!

Staff Conferences

A series of periodic staff "progress" conferences was immediately planned, the meetings arranged so that the entire Administrative Staff could attend them all, another attempt to maintain step-by-step coordination. Each conference took the form of an informal meeting following the pattern prescribed by the Achievement Schedule. The combined thinking of the staff governed all decisions.

TRAINING

If Aladdin allowed survey directors one wish that would come true, they would probably ask for a group of interviewers fully and accurately trained. The staff of the Boston University, School of Public Relations poll fully agreed that one of the greatest areas of possible error lay in the student-interviewers, many of whom had but a vague concept of polling methods, and none of whom had had previous experience. Added to this unpleasant situation was the time factor, or rather lack-of-time factor. Due to circumstances, only three class lectures (fifty-five minutes each) could be devoted to the survey. It was decided to concentrate on three pertinent phases of opinion measurement, devoting one lecture to each, simultaneously correlating the lecture material with the nature of the survey.

Lecture One

The introductory lecture, explaining the various methods of polling and types of interviewing being done in the field at the time, was received with interest. The importance of both the appearance and approach of the

interviewer was stressed. Since the survey was to be conducted on a Personal Interview basis, different class members were asked to be "inter viewers" and test a variety of approaches on the instructor, who, acting as different types of "respondents", dramatized some of the reactions to be expected. In this way, some of the situations and events that would occur were put across to the students and they were given some ideas on how to cope with them.

Lecture Two

This lecture dealt with the ballot and question design. The class was first given six "Principles Governing the Public Opinion Questionnaire or Ballot", according to Dr. George Gallup in his book, "The Pulse of Democracy" (25).

1. The questions should be as brief and to the point as possible. Long conditional or dependent clauses tend to confuse people.

2. The words and phrases should be simple and in common use in the day-to-day language of the community - among all groups.

3. The questions should not include words which have a strong emotional content.

4. The questions must avoid all possible bias or suggestion in favor of or against a particular point of view.

5. The questions should include all the important alternatives which may emerge on a given issue.

6. Where the individual is being asked to choose between different alternatives, this choice of alternatives must be given as early as possible in the questions.

It was pointed out how the ballot to be used (Exhibit Seven) conformed to these principles. For example, the fifth principle listed above was related to Question Six on the ballot, showing the alternatives allowed those respondents who were unacquainted with the nature and/or con-

tent of the Labor Bills, thereby helping to reduce an otherwise extremely large proportion of "undecided" votes.

The last part of this lecture was devoted to a complete explanation of the Instructions for Interviewing (Exhibit Eight).

Lecture Three

The final lecture consisted of two parts. The first dealt with sample derivation, explaining its importance, and defining the theory behind it. To show the part it played in the class survey, use was made of a Ward Sheet (Exhibit Nine). This was copied on the blackboard and explained by the Supervisor of Interviewing as follows:

> The size of the sample has been set arbitrarily at four-tenths of one per cent of the total registered voting population of Boston; this seemed the optimum amount after considering the number of available interviewers and the time to be allowed. The sample will maintain the same proportion of men and women, and Republicans, Democrats, and Independents as exist in the "population". The figure opposite "Total" refers to the total number of registered voters in that ward, beneath which they are divided into their various categories (the Independent figure is an approximation). From these figures, ratios have been established (Exhibit Ten) with the latest available registration figures gathered from the City Hall's Election Department and the quotas set up under the "Sample" section of the Ward Sheet. The figure opposite "Sample" refers to the total number of interviews to be obtained in that ward, with the figure for each classification listed below.
>
> The figure at the top right, in parenthesis, is the number of interviewers assigned to that ward, and the figures beside that show the quota of interviews to be obtained by each. Therefore, four interviewers will work in Ward One, three of them getting twenty-one interviews and one getting twenty-two. The further breakdowns as to sex and political affiliation will be assigned by the "Ward Chief".
>
> Each ward has been further divided geographically by precincts, so that there won't be too much concentration in any single part of a ward. The Roman Numerals in the center of the page refer to the precincts in which each interviewer is to operate - you may interview on any street you wish in those precincts, and your "Ward Chief" will supply you with maps and complete directions before you set out to interview.

The material on the bottom part of the page is background information that does not apply here.

Following a question period, Tally Sheets (Exhibit Eleven) were distributed to each member of the class and the Supervisor of Tabulation presented a twenty-minute talk, summarized here, describing the function of her sphere in the over-all operation of the project.

> Either as each interview is completed or after all interviews have been finished, the student-pollster will transfer the information from each ballot to the Tally Sheet, marking the appropriate squares and then figuring the totals. This sheet, with the ward number and the interviewer's name on top, will be given to his "Ward Chief". As soon as the "Ward Chief" has a completed Tally Sheet from each interviewer in a ward, he will 1) check the sheets for accuracy, 2) compute the totals on these various ward Tally Sheets and 3) transfer these Grand Totals to a new Tally Sheet which then becomes the property of the Central Tabulating System.
>
> This system consists of a row of four large tables, each covered with a huge Master Sheet (Exhibit Twelve) and manned by a tabulator using a calculating machine. The top right section of the Tally Sheet will be checked off as soon as the figures (totals) on the Tally Sheet for each ward have been recorded on these Master Sheets. The tabulation by the individual wards will be recorded on the remaining sheet. For example, when a ward total for "President" has been recorded on the Presidential Master Sheet, the tabulator will place a check mark beside the word "President" and pass it along to the "Gubernatorial" tabulator.
>
> When every ward has thus been processed, the percentages will be calculated from the Master Sheet Grand Totals and the tabulation completed. (Exhibit Thirteen)

ACCURACY OF THE FINDINGS

On the day before election, an Interpretation and Analysis of the Results of the survey (Exhibit Fourteen) was distributed to the entire class. These were the opinions of the Survey Director in the light of the survey results. On the day after election, with the actual results determined, the comparison was evident.

Items One and Two were partially incorrect - Dewey's strength in Boston was overestimated, while Truman's strength was underestimated, although the President did "carry the city by a comfortable margin".

Item Three was correct. Wallace received 2.3% of the national vote and 3.1% of the Boston vote. This difference was predicted chiefly on the basis of the calibre of his Boston backing. While in many areas of the country his following was, for the most part, composed of out-and-out Communists, he drew much of his Boston support from various educational, cultural, and religious groups, whose influence presumably increased his popularity.

Item Four was correct. The survey indicated the three-to-one ratio which actually resulted.

Item Five was correct in that it indicated the degree of "yes" and "no" voting on each of the three Labor Bills (Exhibit Thirteen).

Item Six does not apply here.

Item Seven was incorrect. It was expected that for personal and business reasons, Republican and Independent voters in a predominantly Democratic city would be wary about informing a stranger of their Republican candidate preference, but in the privacy of a polling booth on Election Day would generally vote for that candidate. Because of the large "undecided" response, which was not 'forced' into any classification but, rather, left exactly as it was discovered, and the fact that in previous elections the Republican candidates usually received about two or three times the vote indicated by the number of enrolled Republicans in Boston, it was erroneously assumed that this pattern would occur again in the 1948 election.

The three things to "Watch for" all occurred. The Election Day turnout was almost a record for Boston - in the state, it was a record. This seemed a valid prophesy to make in light of an almost consistent "yes" reply to Question Three on the ballot.

The widespread split balloting was indicated by the election returns, which revealed that Republican Presidential Candidate Dewey and Democratic Gubernatorial Candidate Dever each led their respective running mates (for Governor and President respectively) in all but one of the city's twenty-two wards.

The Wallace vote was proportionately as large in the wards and precincts considered "Republican" as it was in the wards and precincts considered "Democratic", indicating the possibility that he reduced the total vote of both major candidates proportionately.

What was responsible for this comparatively satisfactory performance? Five factors contribute to the answer of this question.

1. Only registered voters of and in the city of Boston were queried. A high degree of control was placed on the sample.

2. Only those interviewees who indicated that they planned to vote on Election Day were included in the poll. People who were not planning to vote, or who were not sure they would, were omitted from the poll.

3. Except possibly on the interviewer level, no bias entered the survey. As mentioned before, this was an educational venture, of, by, and for the class, and not "sponsored" by any person or organization.

4. The area under study was predominantly Democratic, a condition which usually adds to accuracy in public opinion measurement. Where there

is a smaller difference in the size of political parties, accuracy becomes more difficult to obtain, resulting in the necessity of a larger sample and/or different methods of approach to the problem.

5. Last, and by no means least, the interest and zeal of the participating members of the class, many of whom worked diligently through the night to see the poll completed at 4:02 A.M., were responsible for its success.

EXHIBITS

EXHIBIT ONE

CITY OF BOSTON

Per cent of Two-Party Vote

	1944 - For President		1946 - For Governor	
WARD	Dewey (Rep)	Roosevelt (Dem)	Bradford (Rep)	Tobin (Dem)
1	40.3	59.7	41.8	58.2
2	26.2	73.8	30.3	69.7
3	38.0	62.0	42.6	57.3
4	49.3	50.7	63.9	36.1
5	57.4	42.6	72.9	27.1
6	27.0	73.0	37.8	62.2
7	29.3	70.7	41.4	58.6
8	29.8	70.2	40.2	59.8
9	27.3	72.7	47.5	52.5
10	34.9	65.1	39.6	60.4
11	34.1	65.9	42.7	57.3
12	18.7	81.3	48.4	51.6
13	36.6	63.4	44.5	55.5
14	7.9	92.1	39.6	60.4
15	35.9	64.1	42.3	57.7
16	45.5	54.5	46.1	53.9
17	44.2	55.8	52.0	48.0
18	45.4	54.6	53.3	46.7
19	51.7	48.3	53.6	46.4
20	61.1	38.9	61.0	39.0
21	40.4	59.6	60.2	39.8
22	39.8	60.2	42.6	57.4

EXHIBIT TWO

CITY OF BOSTON

REGISTRATION OF VOTERS, AUGUST 13, 1948

WARD	Women	Men	Total
1	9,822	11,517	21,339
2	6,098	6,103	12,201
3	7,266	10,671	17,937
4	8,054	6,587	14,641
5	10,249	6,854	17,143
6	6,007	6,213	12,220
7	8,309	8,325	16,634
8	5,602	5,351	10,953
9	6,641	6,142	12,783
10	7,992	6,650	14,642
11	7,235	6,932	14,167
12	8,994	8,861	17,855
13	7,302	7,159	14,461
14	12,718	13,695	26,413
15	7,027	6,649	13,676
16	9,972	8,523	18,495
17	9,702	8,698	18,400
18	11,382	11,517	22,899
19	9,090	7,737	16,827
20	11,828	10,355	22,183
21	12,136	9,944	22,080
22	8,829	8,500	17,329
	192,255	183,023	375,278

EXHIBIT THREE

CITY OF BOSTON

POLITICAL AFFILIATION OF VOTERS, JANUARY 1, 1948

WARD	Enrolled Democrats	Enrolled Republicans	Independents (Approx.)
1	13,357	922	7,000
2	8,077	340	4,000
3	9,804	770	7,000
4	2,727	2,950	9,000
5	2,622	3,615	11,000
6	7,688	366	4,000
7	10,230	467	5,000
8	5,782	419	5,000
9	4,468	1,389	6,000
10	8,200	722	5,000
11	7,374	913	6,000
12	5,854	2,875	10,000
13	8,190	821	5,000
14	11,315	2,847	12,000
15	8,417	617	5,000
16	10,801	1,230	6,000
17	8,830	2,204	7,000
18	9,821	3,008	10,000
19	8,481	2,070	7,000
20	9,856	4,161	8,000
21	5,832	3,217	13,000
22	8,589	1,159	7,000
	176,402	37,080	150,000 (Approx.)

EXHIBIT FOUR

ACHIEVEMENT SCHEDULE*

Completion of Preparations and Planning

Construction of Organization Chart (Mimeograph)

Assignment of Staff

Choice of Supervisors (One each for Publicity, Interviewing, Tabulating)

Arrangement of Series of Staff Conferences (Two each week, minimum)

Questionnaire Construction

Pretest of Questionnaire

Final Revision of Questionnaire

Assignment of Sample and Quotas to the Interviewing Staff (Ward Chiefs)

Mimeograph Instructions for Student-Interviewers

Lectures to Class by Supervisors of Interviewing and Tabulation

Printing of Ballots (4000)

Final Arrangement of Tabulating System

Interviewing by Students (October 20, 1948)

Tabulation of Information and Results

Final Report of Survey Results

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*This is not in the form of the original Achievement Schedule; many smaller tasks and duties, of little or no significance here, are omitted.

EXHIBIT FIVE

(The following is the advanced Feature Story which appeared in THE BOSTON SUNDAY HERALD, October 17, 1948)

BU TO CONDUCT POLL OF VOTERS

1500 Bostonians To Be Canvassed

Four-tenths of 1 per cent of the registered voters in Boston will receive a visitor Wednesday.

These 1500-odd burghers will know they are being submitted to another election poll, but this one will be in the sacred name of education. It is a project in public opinion surveying carried out by students of Boston University's new school of public relations.

THREE ISSUES

Using all the known techniques evolved by Gallup, Roper and the other great pollsters, a team of 75 students will venture into a broader field than that being covered currently by The Herald. In addition to the presidential race, they will delve into the prospects of the candidates for governor, and also test the prospects of the three controversial labor referenda.

The poll, from the point of view of its originator, Robert K. Norse, assistant professor of public relations, is just a practical application of his course on public opinion and propaganda, but he hopes it will also indicate pretty closely what is going to happen in this city Nov. 2. He has been laying the background all summer for the one-day canvass.

"By obtaining information from competent sources," he says, "I have got a fairly accurate picture of the economic strata of each of the 22 wards. By using this and a semi-selective sampling procedure as to sex and political affiliation, I hope to get a relatively accurate analysis of the voters' sentiment on the interviewing date."

There will be no contact in this survey with the "man on the street." All the voters will be interviewed at their homes, and the students will call morning, noon and evening, in the latter instance to catch the man of the house in his domicile. The pollsters, carefully briefed in their classes, will be further instructed by six "captains," students who have had experience in such surveys, each of whom will have charge of several wards.

Not only will the preferences for president and governor, and on the three referenda be reported, but the results in each instance will be broken down according to sex, age and economic status.

AGE QUESTION

Norse knows of no sure way of getting women to tell their real age, so his students will have to use some observation in setting up the three age groups, 21-35, 36-50, and over 50. Economic status, which is divided up as "higher than average, average" and "lower than average," also presents difficulties, seeing that "average" is a nebulous word. But here the pollster will check by asking the occupation of the head of the family.

"This is an important matter in the training of the class," says Norse, "and it is only incidental that we selected the campaign for the survey. We felt that it was something that the students would be interested in just now.

"But we also feel that we can catch Boston public opinion rather closely on one specific day. There may be change, of course, before election day, since opinions change overnight."

EXHIBIT SIX

Boston University, School of Public Relations Poll

(Radio Spot Announcement)

(thirty seconds)

FOR THE "NEW LOOK" IN EDUCATION WATCH FOR THE BOSTON SUNDAY HERALD ON OCTOBER 24TH. THE BOSTON UNIVERSITY SCHOOL OF PUBLIC RELATIONS HAS RECENTLY CONDUCTED A PUBLIC OPINION SURVEY ON THE COMING ELECTION. IN A ONE-DAY, CITY-WIDE COVERAGE THE STUDENT POLLSTERS HAVE ATTEMPTED TO DETERMINE WHO THE WINNING CANDIDATES WOULD BE IF THE ELECTION WERE HELD ON THAT SPECIFIC DAY. HOW DO YOUR OWN VIEWS COMPARE WITH FELLOW BOSTONIANS? DO YOU THINK AS YOUR NEIGHBOR DOES? READ THIS SUNDAY'S BOSTON HERALD FOR THE RESULTS OF THEIR SURVEY ON HOW BOSTON IS EXPECTED TO VOTE ON NOVEMBER SECOND.

(fifteen seconds)

FOR THE "NEW LOOK" IN EDUCATION WATCH FOR THE BOSTON SUNDAY HERALD ON OCTOBER 24. THE BOSTON UNIVERSITY SCHOOL OF PUBLIC RELATIONS HAS RECENTLY CONDUCTED A PUBLIC OPINION SURVEY ON THE COMING ELECTION. READ THIS SUNDAY'S BOSTON HERALD FOR THE RESULTS OF THEIR POLL ON HOW BOSTONIANS ARE EXPECTED TO VOTE ON NOVEMBER SECOND.

EXHIBIT SEVEN

(QUESTIONNAIRE)

1. Are you a registered voter in the city of Boston at the present time?

- ☐ Yes
- ☐ No

2. With which party are you registered?

- ☐ Democrat
- ☐ Republican
- ☐ Independent
- ☐ Other (Specify which)

3. Do you plan to vote in the election next month?

- ☐ Yes
- ☐ Maybe
- ☐ No

4. Which presidential candidate do you intend to vote for?

- ☐ Dewey
- ☐ Truman
- ☐ Wallace
- ☐ Other (Specify which)
- ☐ Undecided

5. Which candidate for governor do you intend to vote for?

- ☐ Bradford
- ☐ Dever
- ☐ Undecided

6. How do you intend to vote on the labor bills, Referenda 5, 6, and 7?

	No	Yes	Undecided	Uninformed	Not Acquainted With It
5.	☐	☐	☐	☐	☐
6.	☐	☐	☐	☐	☐
7.	☐	☐	☐	☐	☐

. . . . . .

Age: ☐ 21-35
☐ 36-50
☐ over 50

Sex: ☐ Male
☐ Female

Occupation of head of family:

Economic Status:

- ☐ Higher than average
- ☐ Average
- ☐ Lower than average

- ☐ White
- ☐ Negro
- ☐ Other

BOSTON UNIVERSITY
SCHOOL OF PUBLIC RELATIONS

EXHIBIT EIGHT

INSTRUCTIONS FOR INTERVIEWING

1. Make your approach briefly and casually. Show the respondent your identification card, explain simply your purpose ("Good afternoon -- we are taking a public opinion survey in regard to next month's election, and the people on _____ Street have been selected to be interviewed."), and go directly into the first question as quickly as possible, with the very minimum of explanation.

2. Make sure that the person being interviewed is actually living there.

3. Your attitude at all times should be friendly, conversational, and impartial. Take all opinions in your stride. Never show surprise at a person's answer or reveal your own opinion.

4. Remember that the interviewer is fundamentally a reporter. Your job is simply to obtain answers faithfully. Keep the respondent to the point. Discourage irrelevant conversation and avoid arguments and discussions during the interview.

5. Do not explain the nature of the labor bills question or elaborate upon the provisions of the bill. You are recording public opinion, not forming it or educating the public. If the respondent does not understand one of the questions, repeat it slowly with emphasis on important phrases.

6. You are recording the opinions of <u>just that one person</u> whom you are interviewing.

7. Avoid qualified answers ("Well, it depends") by pressing for an opinion, saying something like, "Well, taking everything into consideration," or "On the basis of the way things look now."

8. Pertinent short comments should be written on the face of the ballot. They should be placed to indicate clearly the question to which they apply. Longer comments, if they qualify one of the questions or seem to be of interest or importance to you, should be written across the back of the ballot, with the number of the question to which it refers, if to a question.

9. At all times, and under all circumstances, be courteous. Remember that you represent the <u>School of Public Relations of Boston University</u>.

10. If question #1 on the ballot is answered "no" do not interview thatperson at all, or record that answer on the ballot.

11. If question #3 on the ballot is answered "no" or "maybe" do not interview that person further. Keep the ballot, but move on to the next house. Only complete interviews count toward your quota.

12. Interview only one person in each family. If two or more <u>entirely different families</u> occupy the same house or department building, they may be counted as separate families, but only three families under such circumstances may be interviewed.

13. You may ask approximate age if in doubt; something like, "Into which of these three age groups do you fall?"

14. Refer to Labor Bills as "Referendum #5, 6, and 7."

15. In #3 don't mention "independent" unless necessary. Just, "Which party are you registered with?"

16. In #6, 7, and 8 don't mention "unpaid" unless necessary.

EXHIBIT NINE

Ward Sheet

TOTAL:	21,399	SAMPLE:	85 (4) 3,21 & 1,22
Men:	11,517	Men:	46
Women:	9,822	Women:	39
Dem:	13,357	Dem:	56
Rep:	922	Rep:	5
Ind:	7,120	Ind:	24

Four Interviewers

1. Precincts 2,4,5 (21 interviews)
2. Precincts 6,7 (21 interviews)
3. Precincts 9,12,14 (21 interviews)
4. Precincts 16,18 (22 interviews)

1946			1948
Bradford:	5,626	41.8%	Bradford:
Tobin:	7,806	58.2%	Dever:
			Undecided:

1944		1948
Dewey:	7,207	Dewey:
Roosevelt:	10,686	Truman:
		Wallace:
		Undecided:

EXHIBIT TEN

Derivation of Sample

Ward	Ratio Dem	Ratio Rep	Ratio Ind	Total	Sample Dem	Sample Rep	Sample Ind	Men	Women
1	14	1	6	85	56	5	24	46	39
2	9	½	3	49	35	3	11	25	24
3	12	1	7	72	43	4	25	43	29
4	3	3	8	59	13	13	33	27	32
5	3	4	10	69	12	17	40	28	41
6	8	½	4	49	32	2	15	25	24
7	10	½	6	67	40	3	24	34	33
8	6	½	4	44	27	2	15	21	23
9	3	1	4	51	19	7	25	24	27
10	9	1	5	59	36	3	20	27	32
11	8	1	6	57	31	3	23	22	25
12	2	1	2	72	29	14	29	36	36
13	8	1	5	58	33	4	21	28	30
14	13	3	10	106	53	13	40	55	51
15	10	1	3	55	40	3	12	27	28
16	12	1½	5½	74	48	5	21	34	40
17	10	2½	6	74	40	10	24	35	39
18	11½	3½	8	92	46	13	33	46	46
19	9½	2½	5	67	38	10	19	31	36
20	10½	5	7	89	42	19	28	43	46
21	7	4	11	89	22	13	44	40	49
22	10	1½	6	69	40	5	24	34	35
				1497					

Ward Number _____

Interviewer's Number _____

Interviewer's Name _____

TALLY SHEET

EXHIBIT ELEVEN

PRESIDENT

President _____
Governor _____
Labor _____

Ward % _____

Candidate	VOTE	MALE	FEMALE	21-35	36-50	over 50	High aver.	Average	Low aver.
Dewey									
Truman									
Wallace									
Undecided									
Others									
Totals									

GOVERNOR

Bradford									
Dever									
Undecided									
Totals									

TALLY SHEET

EXHIBIT ELEVEN (Cont'd)
LABOR

Referendum	VOTE	MALE	FEMALE	21-35	36-50	over 50	High aver.	Average	Low aver.
#5 Yes									
No									
Undecided									
Uninformed									
#6 Yes									
No									
Undecided									
Uninformed									
#7 Yes									
No									
Undecided									
Uninformed									
Totals									

EXHIBIT TWELVE

PRESIDENTIAL

CITY-WIDE TALLY

Candidate	Vote	Male	Female	21-35	36-50	Over 50	Higher than Average	Average	Lower than Average
Dewey									
Truman									
Wallace									
Undecided									
Others									
Totals									

EXHIBIT TWELVE (Cont'd)

GUBERNATORIAL

CITY-WIDE TALLY

Candidate	Vote	Male	Female	21-35	36-50	Over 50	Higher than Average	Average	Lower than Average
Bradford									
Dever									
Undecided									
Totals									

EXHIBIT TWELVE (Cont'd)

LABOR

CITY-WIDE TALLY

Referendum Question	Vote	Male	Female	21-35	36-50	Over 50	Higher than Average	Average	Lower than Average
#5 Yes									
No									
Undecided									
Uninformed									
TOTAL									
#6 Yes									
No									
Undecided									
Uninformed									
TOTAL									
#7 Yes									
No									
Undecided									
Uninformed									
TOTAL									

EXHIBIT THIRTEEN

CITY-WIDE TALLY

For President

		Actual
Dewey	24.4%	27.8%
Truman	48.0%	69.1%
Wallace	5.1%	3.1%
All Others	.1%	
Undecided	22.4%	

Breakdown of the Above Figures by Sex

	Male	Female
Dewey	26.7%	21.6%
Truman	48.5%	47.7%
Wallace	5.9%	4.4%
All Others	.3%	.0%
Undecided	18.6%	25.8%

How They Voted by Age Groups

	21-35	36-50	36-50 Over 50
Dewey	22.7%	24.0%	30.0%
Truman	54.8%	48.2%	40.6%
Wallace	6.2%	5.9%	2.8%
All Others	.2%	.0%	.3%
Undecided	17.[illegible]%	23.9%	26.6%

Breakdown of Voters by Economic Status

	High Avge.	Average	Low Avge.
Dewey	41.9%	24.9%	13.6%
Truman	31.4%	49.4%	52.3%
Wallace	3.8%	4.6%	9.0%
All Others	.9%	.1%	.0%
Undecided	21.0%	21.0%	25.1%

EXHIBIT THIRTEEN (cont'd)

CITY-WIDE TALLY

For Governor

		Actual
Bradford.	18.6%	24.1%
Dever	59.0%	75.9%
Undecided	22.4%	

Breakdown of the Above Figures by Sex

	Male	Female
Bradford.	18.0%. . .	.19.1%
Dever	61.9%. . .	.56.8%
Undecided	20.1%. . .	.24.1%

How They Voted by Age Groups

	21-35	26-50	Over 50
Bradford	.18.8%. . .	15.5%. . .	.21.8%
Dever.	.60.6%. . .	60.5%. . .	.57.7%
Undecided. . .	.20.6%. . .	24.0%. . .	.20.5%

Breakdown of Voters by Economic Status

	High Avge.	Average	Low Avge.
Bradford. .	29.8%. . . .	18.0%. . .	14.5%
Dever.. . .	51.8%. . . .	61.0%. . .	56.0%
Undecided	18.4%. . . .	21.0%. . .	29.5%

Vote on Labor Bills, Referenda #5, #6, #7.

	Yes	No	Undecided	Uninformed	Actual Yes	Actual No
#5 (Closed Shop)	8.7%	38.2%	20.7%	32.4%	21%	79%
#6 (Secret Ballot)	9.0%	37.4%	21.0%	32.6%	26%	74%
#7 (Majority Vote)	9.5%	36.7%	20.9%	32.9%	27%	73%

EXHIBIT FOURTEEN
Interpretation and Analysis of the Results of the
Recent School of Public Relations Survey.

If the voters of the city of Boston conform to the pattern shown in our recent poll on Election Day, the results indicate the following:

1. Truman's strength in Boston is decidedly less than that of President Roosevelt in the last presidential election, although he seems certain to carry the city by a comfortable margin.

2. Dewey should do slightly better in the "Hub" than he did in 1944, and, assuming that he obtains a majority of the "undecided" vote, will probably pocket around forty per cent of the Bostonians' vote.

3. Wallace will do about the same in Boston as he does nationally, probably slightly better.

4. Dever will probably sweep Boston by at least 2 to 1. Bradford has lost considerable strength in every one of the city's 22 wards.

5. Each of the three labor bills will be overwhelmingly rejected by the voters of Boston.

6. A large proportion of the voting public, about one-third, is unaware of and unacquainted with the content of the labor bills.

7. Most of the "undecided" vote will go to the Republican Candidates, because of the frame of mind of the Boston voter.

Watch for:

1. A large turnout on Election Day.
2. Widespread "split balloting." (Dewey and Dever)
3. Wallace taking as many votes from Dewey as from Truman.

The above results are not to be regarded as final or decisive. With the chief candidates scheduled for major addresses in Boston between now and Election Day, with a large percentage of the voters still undecided on the candidates and issues, and with several other factors at work that sway public opinion, these results can be considered only as indicative of the outcome of the various contests.

CONCLUSIONS

The main objective of the project in the foregoing Case Study was to provide practical experience in the organization and conduct of a measurement of public opinion. It was demonstrated how a group of college students, with little or no knowledge of the field, efficiently and successfully put into practice the principles derived from the previous experience and knowledge of others.

The interest and zeal manifested by the students indicates an incentive which might very well be applied to the development of the field and the improvement of techniques and devices.

Because of the broad scope of public opinion measurement, great care would have to be exercised in the planning of a curriculum to provide the student with a well-rounded background and sound knowledge of devices and procedures, while at the same time resulting in beneficial contributions to the field.

The author offers, on the following page, a course outline for consideration.

JUNIOR YEAR

First Semester

Public Opinion (Two hours)

A course dealing with the cultural aspects and social implications of the over-all field of public opinion.

Statistics for Public Opinion Measurement (Two hours)

An extensive study of elementary statistics. A survey of methods for presenting data obtained through public opinion research.

Second Semester

Public Opinion Surveys and Analysis (Three hours)

An intensive course limited to a study of the elements involved in organizing, conducting, and analyzing a public opinion survey. Constantly revised to keep pace with and abreast of the refinements and devices in the field. Actual conduct of a survey project.

SENIOR YEAR

First Semester

(Choice of one, depending on area of chief interest and ability.)

Market Research in Public Relations (Two hours)

Emphasis on "company" and "product" research and analysis. Methods of determining and measuring consumer and client preference and attitude. Critical review of previous investigations.

Employee Attitudes (Two hours)

Means of determining and measuring existence, extent, and intensity of employee attitudes, frictions, morale, and motivation. Wide use of Houser Reports and Link Studies.

Second Semester

Advanced Research in Public Opinion Measurement (Two to Six hours)

Open only to those students who have demonstrated extraordinary ability and skill in the entire field. Will function as assistants in courses, directors of research projects, or staff members of public opinion research library.

The foregoing sequence of courses would assure an annual group of students well-versed in the background and fundamental principles of the public opinion field. The adoption of such a program would prepare the student for a part in, or provide him with an adequate understanding of, this vital dynamic force.

A real hope for the advancement of the field of public opinion lies in the nation's educational institutions of higher learning, where the effort that would go into public opinion measurement projects could be directed along lines of constructive research. As one student wrote, "I think the poll was well-organized by the Director and executed ably by the class members. Though it was not perfect, I believe that it gave us first-hand experience in conducting . . . a poll, and since the fate of all the nationally-known pollsters hangs in the balance, it may be that one of us, from this amateur beginning, may answer the question, 'What happened to Gallup, Roper, Crossley, et al?'"

Here is the challenge - will it be accepted?

APPENDIX

APPENDIX A

Example of an Informal Investigation

An appropriate example of an informal investigation has been described in the following manner (4):

> The original problem on one study was to develop copy appeals which would be effective in advertising a new commodity - the automatic electric blanket. Here is an explanatory informal conversation on the subject:
>
> "I just bought my blanket two weeks ago. I saw the advertisement for it in the Post. Of course I had heard about the use of these blankets in hospitals, but that was the first time I realized that they were on the general market. The ad itself sold me the blanket - I like the way the ad read. I thought the blanket would be a wonderful thing.
>
> "As soon as the ad appeared, I knew that I wanted one of the blankets, so I went to Strawbridge's, Gimble's and Wanamaker's. When I couldn't get it at any one of those places I wired the Company, so you know how sold I was on it.
>
> "The reason I wanted the blanket, and like it so much, is that in this cold and damp house I used to get aches. If I had enough covers to keep me warm, their weight kept me awake. Naturally, when I saw the ad for the blanket I knew it would be perfect for my needs.
>
> "There are other advantages besides those I just told you. We used to use three blankets, and it was a tough job to make the bed. Now with one it's a simple matter.
>
> "I've been using the blanket regularly since we got it three weeks ago. It's probably too early in the winter to judge, but on the few cold nights we've had the window has been wide open and we're still warm.
>
> "I'm so sold on the blanket that I've been talking it up to all my friends. I know this is safe because I have a friend in New York who has had one for two or three years and it's still working well".

How was this conversation useful in setting the problem? The first paragraph identified the source of knowledge about the blanket, and suggested a question to cover this point in the questionnaire to

be developed. The second paragraph told about the method of purchase. It cast light on the interest intensity; the buyer made four efforts to purchase the blanket before she was successful. Both of these leads were followed up at the time the problem was further specified.

Additional paragraphs provided further clues about the intensity of interest, and showed that the blanket was bought for highly specific advantages it offered. The fourth paragraph suggested that at least one additional advantage of the blanket was learned from using it. It showed that appeals and advantages of the blanket were distinct.

A number of conversations made it possible to develop a specific list of issues covered by the original objective, and to broaden this objective as well. In addition to copy appeals, the study was now designed to find out place of purchase, how the blanket was heard of, and how intensely the person felt about the blanket.

From the foregoing it is easy to see how a few "test conversations" result in the development of a specific list of issues to be covered and/or in a redirecting of the original objective.

The interviewer who participates in this informal investigation must be skillful, imaginative, and gifted with the ability to constructively analyze even the most casual remark. It has been suggested (5) that the following qualities are requisite:

1. Ability to interest people in a subject and get them to talk freely

2. Possession of ingenuity and imagination

3. Ability to evaluate the information obtained and to interpret statements to bring out their true significance

4. Ability to uncover the motives behind habits and attitudes which are found

5. Ability to report accurately the information obtained from an informal conversation

6. Possession of an adequate knowledge of the field

APPENDIX B

Example of a Statement of Specific Objectives

In the case of the electric blanket investigation in Appendix A, something like the following would result (6):

> The purpose of this investigation will be to measure and determine:
>
> 1. Who bought the blanket
> 2. Where it was bought
> 3. How it was heard of
> 4. Why it was bought (it's appeal)
> 5. Who uses the blanket
> 6. Its advantages and disadvantages in use
> 7. Intensity of feeling about the blanket by the user

APPENDIX C

Advantages and Disadvantages of Four Main Channels of Communication

Personal Interview

Advantages

Probably the most important advantage lies in the fact that the sample or cross section under consideration can be effectively maintained through this type of interview.

The ability of an interviewer to ask questions that are complicated and of broad scope presents another advantage. Assuming that the interviewers are properly trained, the personal interview yields more information than any other type. This personal contact often makes it possible to determine the reason behind certain answers, a most valuable asset to any opinion survey.

The flexibility of face-to-face conversation accounts for the personal interview being the most desirable means of securing insight concerning attitudes and in conducting technical surveys in which either the questions or the answers require supplementary explanation. The things that the observing interviewer sees may be quite as important as the things that he is told. Moreover, people will sometimes divulge information in a personal interview that they would not ordinarily reveal in other types of interviews.

Disadvantages

There is always the danger that the person interviewed will "bend" his answers to suit the investigator. As a rule, people like to please, and unless the utmost care is exercised, the investigator may find himself influencing answers through such subtle means as wording of the question or the intonation of the voice.

The person interviewed may frequently be impatient, which bares another shortcoming. In his desire to be rid of the interviewer, he may give his answers in a hasty, off-hand manner, so that much of the information may be inexact. The skilled and careful interviewer will, however, be quick to observe the moods and manners of the people interrogated. Once observed, he will either correct or eliminate the answers which, in his judgment, represent less than the truth.

Mail Interview

Advantages

One of the chief advantages lies in the complete standardization of the questions. The investigator can be sure that every person has been asked the same set of questions in the same way. Personal interviewers are likely to vary the wording of questions in spite of specific instructions to the contrary.

A second advantage lies in the large number of widely scattered persons from whom information may be secured economically. Hence, the method is best suited for making extensive (referring to geographical area) rather than intensive surveys.

The fact that the mail questionnaire does not require the respondent to identify himself makes it possible to inquire about subjects of a more personal nature than is feasible in a personal interview.

Disadvantages

Although there is a definite place for the mail survey in public opinion measurement, there are certain restrictions in its use. These center in such factors as the absence of an investigator to control and validate the interview, the mechanics governing the make-up of the mail questionnaire, and the lack of knowledge concerning the characteristics of the respondent.

The following summarization (8) clearly describes the significance of these factors and provides "protective information" to the layman who might be tempted to place an unsafe amount of confidence in this type of polling.

> Mail surveys are the only practical - or at least the least expensive - method of making certain kinds of investigations. Suppose for example, the problem is to find out something from the president of every Rotary Club in the country. There's only one in a town, but there is one in each of thousands of towns. A mail survey would be relatively inexpensive, a personal interview would be prohibitively costly.
>
> . . . . . .
>
> Where the purpose of the questionnaire is to extract useful information, and no attempt is made to assume that the "part" is similar to the whole, the mail method is advantageous. An example would be a letter designed to get consumers to tell the uses they make of a product.
>
> . . . Here is a check-list of obvious handicaps which can affect the results of almost any mail questionnaire.

1. Mail questionnaires must necessarily be brief.

2. No mail survey can be better than the (mailing) list. There are plenty of good lists available through houses that specialize in building lists, or in directories, customer lists, prospect lists and the like. But no list is ever strictly up-to-date. It contains errors the day after it is prepared. People die. People move away. People change jobs. Firms go out of business.

3. Mail investigations take a long time to complete. Richard Watson of the Marketing Research Corporation of America quotes the average time for completing a mail investigation in a large advertising agency with all statistical facilities as follows:

	Number of Days
Arrangement with six sources for mailing lists.	4
Time of sources to organize lists.	14
Minimum time that should be allowed for replies to be returned.	21
Tabulation.	14
Summary and analysis (including revised drafts, charts, typing and photostats).	7
Total	60

4. Mail investigations are more costly than generally assumed. If you send out one thousand letters at ten cents each, the cost is only ten cents per letter. BUT, if only one hundred come back (the average return) the cost is actually one dollar per letter. Even the double-post card will cost close to five cents each, and a ten per cent return here will mean a real COST of fifty cents per return.

5. Respondents cannot report certain facts accurately by mail. Any questions requiring extensive discussion must be eliminated.

6. The percentage of mail returns is almost invariably small, running between two and thirty-five per cent, with an over-all average somewhere in the vicinity of seven per cent.

7. There is no way of knowing that the people willing to reply are representative of the whole group.

8. Certain groups are missed completely in mail returns. The returns don't represent those who are unable to read, dislike reading, or who dislike writing letters. They don't represent outdoor occupations, usually just desk-sitters. The middle-class groups

answer more than the high- or low-income groups. The people living in smaller cities are more likely to respond than those living in larger cities. Finally, a very large share of returns are from habitual coupon clippers, contest entrants, and children. This type of distortion becomes increasingly important if a reward is offered for filling out the questionnaire.

9. Certain occupational groups answer much more than others. If a questionnaire were to be sent to one thousand advertising agencies, one thousand advertising managers, one thousand purchasing agents, one thousand sales managers, and one thousand presidents of companies, the response would likely be something like this:

	Returns
One advertising agency employee in three.....	333
One advertising manager in every five.....	200
One purchasing agent in every ten.....	100
One sales manager in every fifteen.....	67
One president in every twenty.....	50
Total	750

These 750 replies out of five thousand questionnaires sent out would be a 15 per cent return. This is very satisfactory, but what does it mean? Presumably all groups would be important to the company making the mailing, but the returns range from five to thirty-three and one-third per cent. The 95% of presidents who did not reply, may feel at complete variance with the 5% who did reply. And take the replies from advertising agencies: WHO replied? Was it an office boy or the head of the business? Was it the head of the business or his pretty red-headed secretary who presumed to know what the boss would want to say?

10. The respondent to a mail investigation may not be the person who was addressed. Does he pass it on to someone else to fill out, or does someone fill it out before he gets it?

11. The response from users will be greater than from non-users. A test by the Proctor and Gamble Company showed that 92% of the respondents to a mail questionnaire were users of the product, while 40% of those who did not reply were users.

12. Responses are confined largely to those particularly interested. It is a simple matter to toss an uninteresting (to the respondent) questionnaire into the wastebasket. The subject of ANY questionnaire will be uninteresting to some people.

13. Those who think "NO" on controversial questions are more willing to answer than those who think "YES". The Literary Digest fiasco was due to a failure to sample properly, but it was also due to the fact that certain conditions existed in 1936 that did NOT exist in 1932. That is, among the people who were polled, those who were against Roosevelt were much more likely to answer this mail survey than those who were for him, because it had become that kind of an issue. Those for Roosevelt felt no great urge to reply.

14. The reasons why people do not respond are vital. Often the very reasons why a large percentage do not respond are vital to a study of the entire problem. In a twenty per cent return, the results give absolutely no clue as to how the other eighty per cent feel.

15. Mail returns are dangerous where the respondent is asked to choose between competitive things. However, when the purpose of the survey is to find the answer to a simple problem, the mail questionnaire is satisfactory and often much less costly.

16. Mail returns tell little about age or economic status. Of course, the respondent does not always tell the truth to a personal interviewer, either, but he is there and can observe the quality and validity of the answers.

17. Mail questionnaires are impossible to phrase so that alternatives or qualifying responses are followed up.

18. Mail investigations do not allow a "general summary". In a personal survey, interviewers can add to the value of their calls by reporting their general observations. They can report the "feel" of the interview, and the impressions they got of the respondent.

Telephone Interview

Advantages

Telephone interviews are frequently resorted to in making radio-listener surveys; by proper organization, hundreds of interviews may be completed within the hour or the fraction thereof during which a radio program is on the air. Thus its timeliness and relative cheapness are its

chief virtues. The cost per interview seldom exceeds the cost per return from mail questionnaires, and it may be very much less.

The telephone is frequently an effective means of reaching people whose position in the business, professional, or social world would tend to preclude, or at least to make difficult, gaining an audience with them. (This is not always true, however, because a good interviewer is able to get an interview from just about anyone.)

Telephone surveys do not usually require skilled interviewers; it is entirely practicable to use semi-skilled part-time interviewers, thus adding to the financial savings.

Disadvantages

Probably the chief limitation to the telephone survey is that the sample of persons from whom the information is gathered is automatically limited to those who are telephone subscribers. A cross-section of the general population is impossible to obtain.

The fact that real rapport between investigator and respondent cannot be achieved by means of the telephone interview presents a second drawback of this channel.

Finally, there is the inherent disadvantage of using the telephone in rural, sparsely-populated regions served by party lines. This greatly lessens the "confidential" aspect of the interview.

Panel Interview

Advantages

A friendly relationship can be established between the interviewer and the respondent, which, after the first interview, eliminates the effort of winning confidence and explaining such things as "why public opinion polls are conducted". As the interviews continue, new and more personal questions may be asked.

After a number of visits with the same respondents, the interviewer "gets to know them" and is often able to accurately interpret the valid significance of their answers.

Disadvantages

A serious disadvantage lies in the inescapable situation that the respondents know they are going to be interviewed and are apt to become self-conscious. Between interviews they may give an abnormal amount of thought and consideration to the topic being measured. Moreover, they may be afraid to reveal a change of attitude to the interviewer for fear of appearing inconsistent in their thinking. However, skillful interviewing and effective wording of questions can partially offset this condition.

Another disadvantage may result from the non-consistent sample. Respondents are continually dropping out for one or more reasons, and the possibility exists that the size of the sample will become inadequate. A common safeguard for this is to make the size of the original sample (Panel) larger than necessary, assuring an adequate number remaining to be interviewed at the end.

APPENDIX D

STUDIES IN SECRET-BALLOT TECHNIQUE

By Lawrence Benson

Public Opinion Quarterly
Vol. 5, 1941 pp.79 - 80

Just prior to the Maine State election last September (1940), a crew of interviewers were sent to Lisbon Township, Maine, to make a complete census of all persons of voting age in that Township to determine which candidates for certain State offices they planned to vote for, and also which Presidential candidate they favored.

Half the interviews were made with secret ballots, and the other half were made in the usual way with the interviewer recording the respondent's answers. The use of the secret and the ordinary ballot was alternated to insure comparable sample groups. Every other person interviewed was asked to fill out a secret ballot and to place it in a sealed ballot box carried by the interviewer. This procedure was continued throughout all interviewing, until all the homes and places of business were covered. In order to include each person of voting age in a family, interviewers had to call back at some homes to obtain opinions of family members who were out at the time of the first call.

After practically all of Lisbon Township's eligible voters had been contacted and their opinions obtained (about 95% of the voters), the secret and non-secret ballots were tabulated separately and these interesting facts were revealed:

1. The number of "undecided" voters was greatly reduced on the secret ballot.

2. This reduction in the undecided vote resulted in increasing strength for the Democratic candidate.

Exactly what happened is shown in the following table which gives the figures for the Senatorial contest between the major party candidates.

SENATORIAL CONTEST

	Personal Interview	Secret Ballots
Brann (Democrat)	51%	56%
Brewster (Republican)	49%	44%
	100%	100%
Undecided	21%	9%

Note that the undecided vote dropped from 21% on the personal ballots to 9% on the secret. Since both samples were alike, these differences could not be due to composition of the samples. The only logical explanation for the difference is that a large number of people who were interviewed in the usual way actually had a choice, but were reluctant to state it. Their reluctance may have been due to any number of factors, but in this case the interviewers felt that fear of possible reprisal for supporting the wrong candidate was the predominating reason.

PRESIDENTIAL CONTEST

	Personal Interview	Secret Ballot
Roosevelt	54%	55%
Willkie	46%	45%
	100%	100%
Undecided	16%	2%

Here the number of undecided voters was even more drastically reduced by use of the secret ballot than in the Senatorial survey. In the latter, the number of undecided voters was more than cut in half, but in the Presidential survey it was shaved to one-eighth. The findings in this study clearly emphasised the importance of knowing more about the undecided vote, for it showed that this vote could directly affect the results.

APPENDIX E

Extensive Discussion of Sampling

The Statistician (19)

The basis of the sampling process is that a moderately large number of items chosen at random from a very large number of items should have the characteristics of the larger group. This does not imply that a perfect resemblance between the sample and the whole is necessary, but it is essential that the sample indicate the characteristics of the whole to a high degree.

Although the principles of sampling are sometimes referred to as the "laws of sampling", they are not laws in the strict sense of the term, but are, rather, principles and tendencies which appear to operate universally.

The principle of statistical regularity may be briefly stated as: If a reasonably large sample is selected without bias from a mass of phenomena, the characteristics of this sample will differ but little from those of the entire universe. It follows that this principle is the very basis of sampling, for after having studied a portion of the phenomena bearing upon a given problem, it is possible to rely upon this principle to depict fairly accurately the characteristics of the entire group. It is also clear that this principle makes possible a material reduction of the work necessary before accurate conclusions may be made concerning any large group of quantitative data. Thus, if one were desirous of studying the changes in the earnings of factory workers in the United States, it would not be necessary to include all factory workers, nor the workers in all factories. If the earnings records of 25 per cent of the workers in 25 per cent of the factories were studied, almost as good a view of the changes in the earnings of factory workers could be obtained as if all factory workers were included in the analysis. Such samples, however, must be properly chosen so that bias will be avoided, and so that there will be a fair distribution by areas and classes of factories.

The principle of large numbers is based upon the same reasoning as the principle of statistical regularity. A short statement of this principle is: Whenever an event may happen in only one of two ways and the event is observed to happen under the same essential conditions a large number of times, the ratio "p" of the number of times that it happens in one way to the total number of trials appears to approach a definite limit, let us say "P", as the number of trials increases indefinitely. Thus, in a bank with a large number of branches, the proportion of the number of customers having accounts with balances below $100 may vary greatly from week to week among the different branches, some branches having a smaller number than the preceding week, other branches having a larger number. For the bank as a whole, however, the RELATIVE number of accounts less than $100 may not change greatly from one week to the next.

A related principle is the principle of small numbers, sometimes called the "principle of persistence of small numbers". In brief, it may be stated as follows: If, in a group of quantitative phenomena selected without bias, a small proportion of the group deviates sharply from the characteristics of the remainder of the group, this tendency will persist no matter how large the group may be made and irrespective of the number of samples chosen. Thus, if one were to tabulate the length of service of employees of several concerns which had been operating for, say, forty years, one would be almost certain to find a small number of employees who had been in the service of the concerns for a considerable number of years, say twenty-five. This law is the law of the distribution of events which happen rarely. (For explanations of the mathematical basis the reader is referred to discussions of the Poisson exponential function which characterizes this law.)

An additional corollary of the principle of statistical regularity is the principle of decreasing variation, which is as follows: As a larger and larger proportion of a group of phenomena is selected by the cumulation of successive unbiased samples, the characteristics of each enlarged sample (namely the average, the deviations, the skewness, etc.) will tend to differ less and less from the characteristics of the group in the preceding (smaller) sample and from the characteristics of the group as a whole. Intelligent application of this principle makes it possible to determine the size of the sample (in proportion to the whole of the data) which must be taken in order that the characteristics of the sample may, within prescribed limits of accuracy, be attributed to the whole group.

It is obvious that the sample must be representative, to a practical degree, for the problem at hand. In a strictly random sample, any item has as good a chance of being included as any other. If this is not the situation, a special effort will have to be made to select the sample in such a way that allowances can be made for any bias. Strictly random sampling is not commonly possible in business statistics. The most common form of sampling may be called directed sampling, since a distinct effort is made, by appling some system of control over the selection of data 1) to increase the certainty of a proportional representation from the various related types and groups of elements in so far as those types or groups are known to exist or to have a bearing upon the problem at hand; and 2) to exclude (to save time, energy, and expense) those types or groups which are known to have no bearing upon the problem at hand.

The Sociologist (20)

The theory of sampling has been used, largely with material things, for thousands of years. An early example was sampling wine by tasting it - a few sips would define the whole vintage. Most of us use sampling to save ourselves work without realizing that we are on the edge of a scientific technique. The other day, for instance, I wanted to know how many words I had written of this book, (so) I counted the words on five typed

pages chosen at random, averaged them, and multiplied by the number of pages. I knew through previous tests that the result would be within two or three per cent of the true number of words.

The first use of scientific sampling in the social field seems to have been when Halley . . . employed the mortality statistics of Breslau in 1693 to draw conclusions about the mortality of mankind - and incidentally to lay a basis for the insurance business. In 1800, Sir Frederick Eden estimated the population of England at nine million using sampling techniques, and next year the actual census which counted the total "universe" confirmed the estimate. Sampling can be applied in nearly every field, both in the natural and social sciences.

Some individuals must be selected from the universe in such a way as to represent all the people in the universe. Random sampling means using some automatic method of choosing which gives each individual in the universe an equal chance of being included in the sample.

. . . . . .

With all due allowance it is clear that a powerful new engine of social science is here in the making. It has been developed, furthermore, almost exclusively in America. Public Opinion research is the joint product of probability theory, of college professors, of government experts and of businessmen - a curious but vital combination.

The Public Opinion Analyst (21)

Size and accuracy are inextricably linked in the minds of most laymen. Invariably the first question that is asked by persons who examine the results of a public opinion survey is: "How many persons were included?"

Actually, the size of the sample (the number of persons interviewed) is far less important as a factor in achieving reliable results in modern polling than the representativeness of the persons chosen to be interviewed. The number of persons who must be included in a sample or cross-section can be determined by reference to the laws of probability, first set out by Bernouilli in 1713. But even if the director of a polling organization had no knowledge of these laws, the exercise of common sense would prove to be a sufficiently good guide. All that he would have to do is to follow the simple plan of adding cases until these additions failed to make any important difference in ones that might be used to change the results - after a certain number, any further additions would not alter the results. One example, selected by chance from hundreds of similar ones that might be used, deals with the nation's attitude toward prohibition as reported by the American Institute of Public Opinion early in 1944.

The first national sample containing proper proportions of the various population groups included 1,327 interviews. To determine the extent of variation resulting solely from the number of persons reached,

this sample was divided in a random manner into three groups of approximately the same size. The first sample showed the following results:

Persons favoring the return of prohibition	137	or 31%
Persons opposing the return of prohibition	276	or 62%
Those without opinions or undecided	29	or 7%
Total	442	

When results of the second and third samples are added to the figures given above, the following totals emerge:

	Favor	Oppose	No opinion
First sample of 442	31%	62%	7%
First and second samples totaling 884	29%	63%	8%
First, second, and third samples totaling 1,327	30%	63%	7%

Additional surveys were conducted on this issue until a total of 12,494 persons had been interviewed, with results as follows:

	Favor	Oppose	No opinion
When 2,585 persons had been interviewed	31%	61%	8%
When 5,255 persons had been interviewed	33%	59%	8%
When 8,253 persons had been interviewed	32%	60%	8%
When 12,494 persons had been interviewed	32%	61%	7%

The above figures reveal that the greatest difference between the results for the entire sample of 12,494 and the various smaller samples was two percentage points for those opposed to prohibition, and the maximum difference between any two samples of any size was four percentage points.

The important point demonstrated here is that this survey of the nation's attitude toward the return of prohibition might have included any number of persons from 442 up to 12,494 and the results would have been substantially the same.

If a sample is accurately selected, it represents a near replica of the entire population. It is a miniature electorate with the same proportion of farmers, doctors, lawyers, Catholics, Protestants, old people, young people, businessmen, laborers, and so on as is to be found in the entire population.

APPENDIX F

Hypothesis Advanced for Improved Technique of Sampling

Presidential Polls

By John H. Slaughter,
of the
Earl Newsom Co., N.Y.C., N. Y.

I have an interesting and perhaps valid hypothesis which might explain why the pollsters went wrong in the past election. It seems that Gallup, at least, had the right data for correctly forecasting the election results but that he based his predictions on the wrong set of figures.

My hypothesis is that party affiliation gives a better indication of actual voting intentions than replies to a direct question as to the person the respondent is going to vote for. If this is the case, it is necessary to determine voting intentions only among those who consider themselves Independent. This hypothesis is substantiated by the results of the last three presidential elections. Data are not available for testing the 1936 election.

Party affiliation was obtained by Gallup, just before the last election, from replies to this question: "In politics as of today, do you consider yourself a Republican, a Democrat, a Progressive, or an Independent?" Answers to this question divided as follows:

Democrat	44%
Republican	35
Progressive	2
Independent	19
	100%

According to my hypothesis, all of the 44% who consider themselves Democrats would actually vote Democratic, regardless of who they told the polltaker they would vote for. The same for Republicans and Progressives. It then becomes necessary to determine how the Independent vote divides. This can be done by asking a direct question as to whom they intend to vote for. Gallup shows that the Independent vote was distributed as follows: Dewey 55 per cent, Truman 35 per cent, Wallace 8 per cent, Thurmond 2 per cent. Applying this distribution to the total 19 per cent of Independent vote, we get the following distribution:

Dewey	10.5%
Truman	6.6
Wallace	1.5
Thurmond	.4
	19.0%

By adding the 6.6 per cent of Independents who intended to vote for Truman to the 44 per cent of voters who think of themselves as Democrats, a total vote of 50.6 per cent is obtained for Truman. By adding the 10.5 per cent of Independent vote that went to Dewey to the 35% of voters who think of themselves as Republicans, a total vote of 45.8 per cent is obtained for Dewey. On the same basis the indicated Wallace vote is 5.5 per cent and the indicated Thurmond vote is 0.4 per cent.

The following table compares the estimated results with actual election results as indicated by incomplete returns to date:

	Actual vote to date	Per cent of actual vote	Estimated vote
Truman	22,590,000	49.9	50.6
Dewey	20,739,000	45.8	45.5
Wallace	1,061,000	2.3	3.5
Thurmond	911,000	2.0	0.4
	45,301,000	100.0	100.0

The estimated percentage for Dewey is only 0.3 per cent off the actual vote. The estimate for Truman is overstated by 0.7 per cent. The estimate for Thurmond is much too small and the estimate for Wallace is too high. The discrepancy in the Thurmond vote probably can be explained by the fact that the survey sample is on a national basis and does not truly reflect the concentration of Thurmond votes in a few southern States. The over-estimate for Wallace might be due to the fact that he was not on the ballot in some States.

In 1944, 41 per cent of the people considered themselves Democrats, 39 per cent thought of themselves as Republicans, and 20 per cent claimed to be Independent. The Independent vote broke down 62 per cent favoring Roosevelt, and 38 per cent favoring Dewey. This meant that Roosevelt got 12.4 percentage points among Independents, while Dewey got 7.6 percentage points. Adding these to the respective Democratic and Republican votes, a total of 53.4 per cent is obtained for Roosevelt and 46.6 per cent for Dewey. The major party vote actually divided 53.8 for Roosevelt, 46.2 for Dewey. Roper's estimates were 53.6 - 46.4; Crossley's were 52.2 - 47.8; NORC's were 51.7 - 48.3; Gallup's were 51.5 - 48.5.

In 1940, 42.5 per cent considered themselves Democrats, 37.5 per cent considered themselves Republicans and again 20 per cent considered themselves Independents. Among the Independent vote, 61 per cent said they were going to vote for Roosevelt and 39 per cent said they were going to vote for Wilkie. This gave Roosevelt 12.2 percentage points from the Independent vote and Wilkie 7.8 percentage points. Adding these to the respective Democrat and Republican vote, gives Roosevelt a total of 54.7 per cent and Wilkie 45.3 per cent. The major party vote divided 55 per cent Roosevelt, 45 per cent Wilkie.

The chief problem to be dealt with here is one of accurately defining the size and quality of the Independent vote. In the large cities the Election Department records at the City Hall would provide lists of the Independent voters with their names and addresses, but in rural areas, and others not having this facility, there would be the prerequisite of a survey to compile an adequate sample of these voters.

It would be necessary to exercise caution here regarding the respondent who might not want to reveal his party affiliation to the interviewer. This might be achieved by re-wording Gallup's original question to read: "In politics as of today, do you consider yourself a Republican, a Democrat, or a Progressive?" The word, or suggestion, "Independent", would be omitted. Under the original question many people would reply "Independent" to conceal their actual affiliation, but if this choice was not mentioned the chance for a positive reply would be increased. If the respondent himself mentioned he was "Independent", without having it suggested to him, the answer would be more valid.

Still more validity might be obtained through the use of a secret ballot (discussed in the next "area") whereby the respondent, unseen by the interviewer, indicates his preference of party on a ballot and drops it, folded, into a container carried by the interviewer. Again, the word "Independent" would not appear on the ballot, but would have to be written in.

It is entirely possible that this "Independent Voter Analysis" will become the 'new look' in political polling.

The various State elections in 1950 will provide an excellent testing-ground for this hypothesis.

One suggestion, advanced quite frequently, is to assign varying "weights" to different segments of the sample, based on the expected proportion of the turnout at the polls. For instance, if it were indicated that ninety per cent of the "labor segment" of the voting population had a very high degree of interest in the outcome of an election because of some vital labor issue at stake, and only sixty per cent of the "white collar segment" had that degree of interest, it would be wise to assign representative weights to the results of these two segments in a pre-election poll. This procedure would tend to "out-mode" the proportional sample (described on page 41) and favor the method of "area sampling". Referring again to the 1948 election, the proportional sample that was widely used failed to catch the abnormally high labor sentiment toward Truman and the widespread apathy among the middle-upper class voters. Had "area sampling" been employed and weights assigned to the various categories, this sentiment might have been discovered.

One glaring disadvantage of the above is the extreme difficulty encountered in estimating the turnout. One authority has this to say about it: (22)

> Prediction of turnout is almost impossible to achieve through questions so far devised and tested. Present questions do not seem to predict "turnout" accurately, even though questions about <u>political preferences</u> are accurate. In 1942, when the National Opinion Research Center conducted a pre-election experiment in Boulder, Colorado (Append.B), the error in the gubernatorial and senatorial races was only 0.2 and 0.3 per cent respectively. But, while 80% told interviewers they would vote, only 55% did - an error of 25% on turnout! This illustrates why Gallup's chief difficulty was one of validity, not reliability. As long as turnout responses are invalid, the pollster has three choices: 1) standing by his turnout figures, although experience tells him they are subject to a heavy turnout bias and an altered ratio of Democrat-Republican participation; 2) weighting his turnout figures on the basis of historical data and personal judgment, as

Gallup did; or 3) searching for new turnout questions which will obtain valid responses, the choice taken by NORC.

Because the turnout problem concerns validity of questions, NORC in its own prediction did not adjust its figures with registration or previous election figures. Instead, they used a battery of six different questions* to determine whether an individual's preference should be included in the prediction. Preferences of those whom the six questions indicated to be unlikely voters, were excluded.

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*This method, used by the National Opinion Research Center, is very similar to Gallup's "Quintamensional Plan of Question Design".

APPENDIX G

The author was recently engaged by the Massachusetts Society of Certified Public Accountants to conduct an Attitude Measurement Survey.

The very nature of this project, from start to finish, constitutes its eligibility for inclusion here. Special emphasis has been placed upon the substance and compilation of the formal Final Report. This semi-graphic, semi-editorial presentation characterizes the present-day compendium generally accepted in the field.

ACHIEVEMENT SCHEDULE

Preliminary discussion with sponsor of survey

Determination of specific objectives

Compose questionnaire

Selection of staff ("earmark" an alternate interviewer)
Specify times for series of conferences throughout survey

Choose Sample

Assign list of respondents to each interviewer (I have them mail introductory letters)

Mimeograph ballots (questionnaires)

Briefing - distribute materials to interviewers including "thank-you note" forms

Pretest

Interviewing

Preparation of Report

Report to Mr. --------- (sponsor)

Step-by-step contact was maintained with the sponsor to assure a mutual understanding and agreement of the entire project.

Massachusetts Society of Certified Public Accountants, Inc.

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JAMES B. WILLING

RUTH M. WELTON, ASST. SECRETARY

(Introductory Letter)

March 5, 1949

Mr. John J. Jones, President
Milton Manufacturing Company
Milton, Massachusetts

Dear Mr. Jones:

The Massachusetts Society of Certified Public Accountants feels that business and industry occupies too important a part of American life to continue on their present course of being too often "undersold" in the eyes of the public.

As one phase of this problem, the Society would like to know what part you believe the Certified Public Accountant plays in our economic life. It has planned an Attitude Measurement Survey and it is hoped that through your cooperation valuable opinions will be obtained.

By means of this survey, the Society is attempting to determine how much, or how little, is known and thought about Certified Public Accountants. This will be achieved by having a few people like yourself answer, or express opinions on, seven short questions.

In a few days I will ask for a seven-minute appointment at your convenience.

May I have your help?

Sincerely yours,

Robert K. Norse
Survey Director

Attitude Measurement Survey

Robert K. Norse, Survey Director

Instructions for Interviewers

The Massachusetts Society of Certified Public Accountants has engaged our services in conducting an attitude survey among businessmen in organizations of various types and sizes to determine the extent of their opinion on certain questions. You will be given a quota of people to interview, prior to which you will participate in a two-hour briefing which will completely clarify the situation and answer any questions that may arise.

You will find this a most interesting and stimulating experience, and I am certain that we shall produce an outstanding piece of work for the Society. The following information will act as a guide through this project. From start to finish, the chief emphasis will be placed upon QUALITY.

Personal

At all times and under all circumstances you are to conduct yourselves and your business as gentlemen. Remember, in the eyes of many of the respondents, YOU will personify the C.P.A. profession. Your appearance should be neat, your interest sincere, and your manner pleasant. Repeat.....Your appearance should be NEAT, your interest SINCERE, and your manner PLEASANT.

Schedule

Mail the introductory letter to each of your prospective respondents three (3) days before you plan to go for the interview.

When you arrive for the interview mention the letter and politely request a seven-minute appointment at the respondent's convenience. Many will grant you an interview immediately; others will give you an appointment (for which you MUST be on time). A few may show no interest and be unwilling to see you. In such cases, NEVER press for, or insist upon, an interview. Merely make your exit.

RETURN ALL INTERVIEWS PERSONALLY TO ME. Do not give them to someone else to deliver. Give them to me personally.

Mail a "thank-you note" to the respondent the day following the interview (or sooner after the interview, if you wish).

Questionnaire

Ask the respondent for as little information as possible concerning the data at the end of the questionnaire. It is entirely possible to observe all the information. The "Company", "Address and Telephone Number of Company," and possibly the "Type of Company" will be known by you ahead of time. If a respondent does not wish to reveal his name, it is perfectly all right, but ask him for his position in the company, telling him that the questionnaires are tabulated by the various types of positions and types of companies. Do NOT ask for or record the respondent's home address.

Beside "Name," note if respondent is a CPA, whether he gives his name or not. NAME: ----------(CPA); or, NAME: (CPA).

Just before recording the data at the end of the end of the questionnaire, ask the respondent if he has any other comments or remarks. If he HAS, record them (verbatim, if possible).

Do not mention it unless asked, but ALL information is considered confidential and will be kept within the confines of the survey group; there is absolutely no obligation of any kind.

If the prospective respondent is busy when you first call and won't give you an appointment, ask if you may be referred to someone else of equal or ample rank who is LESS busy.

On the back of the last page of each questionnaire, you are to record two grades describing the respondents':

Degree of Cooperation. . . . . .(Grade)

Reliability of Respondent's Information. . . . . .(Grade)

Employ the same marking system used by Boston University.

Be sure to read ALL the alternates on the question before asking for an opinion or answer.

In Question #7, regardless of the initial answer, read off the entire list of sources - it will often serve to refresh the respondent's memory.

Questionnaire

Interview only one person from each firm. In the case of a large company, such as Lever Brothers, you may interview two people PROVIDED they are "widely separated" in the company (the manager of the accounting department and the Vice President in charge of Personnel, for example). You would never interview two people in the same department regardless of the size of the company.

You are to sit down with the respondent and go through the interview WITH HIM (OR HER), explaining each question as per briefing. YOU are to record ALL the answers in the appropriate spaces, and please PRINT EVERYTHING you put on the questionnaire. It is perfectly all right for the respondent to see the questionnaire.

Record the answers to questions dealing with OPINION in the respondent's own words, if those words express his opinions accurately and in the way he meant them. Be sure you attach the right meaning to each of the answers you receive. THIS IS IMPERATIVE.

ANY remarks that you consider conducive to this study are to be noted in the margins of the questionnaire or on back. Pay close attention to EVERYTHING that is said and draw out every bit of information that you are able to.....and remember, MAKE A GOOD IMPRESSION!!!

Here are the important details to remember about each of the questions. PRINT EVERYTHING.

Question 1. ALL respondents must answer ALL categories. Press for an answer, if necessary, by saying something like, "Taking all things into consideration", or "If you HAD to assign a temperature to this occupation, what do you think it would be?". Explain to the respondent that, for comparison purposes in the final tabulation, it is essential that you have an answer for every part of this question.

Have the respondent READ THROUGH THE LIST BEFORE HE ANSWERS, in order to get acquainted with the range of occupations. This perspective is a "must" in order to be able to answer accurately.

Inform the respondent that he may give a rating of ANY DEGREE BETWEEN ZERO AND ONE HUNDRED, and that THE SAME DEGREE MAY BE GIVEN TO MORE THAN ONE OCCUPATION if he thinks it is justified. As far as possible, however, attempt to get some differentiation between all the categories, even if it is only one or two degrees.

Question 2. Just about everyone has some idea of the difference, right or wrong, and it is up to you to "draw out" the respondents' idea of the difference. In the rare case of a person NOT knowing the difference, merely write "no difference", but only do this after you have made a sincere attempt to find out. You may eliminate embarrassment by telling the respondent that there is actually no "right" or "wrong" answer to this question, but merely an "opinion answer".

Question 3. In the first part of this question, make sure that it WAS a C.P.A., not just a public accountant.
Under the "reaction" part, you will usually want the reaction of the party that PAID the CPA or ENGAGED him.
(Example) If you are interviewing the office manager, to whom the President of the company periodically or occasionally sends a CPA for an "account check-up", find out, from the office manager if possible, what the President's reaction is to the work. If the office manager you are interviewing is the one that engages the CPA, there is no problem, of course.

Question 4. Self explanatory, but GET THE REASON FOR THE ANSWER.

Question 5. Auditor and C.P.A. mean the same thing in this question.

An alternate wording could be "...in making a corporation's financial statement more accurate and acceptable."

Question 6. GET THE REASON FOR THE ANSWER.

Question 7. (Example)

An address was delivered by a CPA on the radio and published the following day in the Boston Herald.

If the respondent just heard the speech over the radio, he would check "YES" for Radio, indicate the nature of the speech as Favorable or Unfavorable, and list the radio station, if he remembered, beside the word "Radio".

If he just read about it in the Boston Herald, he would go through the same procedure for "Newspaper".

If he heard the broadcast AND read the speech, he would mark BOTH "Newspapers" and "Radio". If the Herald treated the speech in aderogatory manner, the respondent would mark "Favorable" from the radio source and "Unfavorable" from the newspaper source. (If he was also present at the address, he would also check accordingly under "CPA's".)

SOURCE		YES	NO	FAV	UNFAV
Newspapers	THE BOSTON HERALD	☑	☐	☐	☑
Magazines		☐	☐	☐	☐
Radio	STATION WCOP - BOSTON	☑	☐	☑	☐

AT NO TIME is the respondent to be asked to reveal anyone's name except his own.

Here is an example of how the end of the questionnaire might appear.

NAME: JOHN J. JONES

POSITION: PRESIDENT

COMPANY: JOHN J. JONES MANUFACTURING CO

TYPE OF COMPANY: MAKES HOUSEHOLD FURNITURE

ADDRESS AND TELEPHONE NUMBER OF COMPANY:

34 MAIN STREET
BOSTON 12, MASS

CO 5-1234

SEX: MALE

AGE: 21 - 35
36 - 50
Over 50

ND

As shown above, initial the lower right-hand corner of the last page of each ballot, and underline it twice.

PRINT EVERY BIT OF INFORMATION YOU PUT ON THE BALLOT.

EVERY RESPONDENT MUST GIVE AN ANSWER TO EVERY QUESTION.

Massachusetts Society of Certified Public Accountants, Inc.

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HAROLD A. MOCK, VICE-PRESIDENT
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HAROLD S. TREWORGY
NORMAN H. S. VINCENT
JAMES B. WILLING
RUTH M. WELTON, ASST. SECRETARY

(Thank-you Note)

March 12, 1949

Mr. John J. Jones, President
Milton Manufacturing Company
Milton, Massachusetts

Dear Mr. Jones:

Thank you again for your participation in the survey conducted by the Massachusetts Society of Certified Public Accountants.

Your opinions will be of great value in making this project a success.

Sincerely yours,

Robert K. Norse
Survey Director

F I N A L R E P O R T

of

A T T I T U D E M E A S U R E M E N T S U R V E Y

CONDUCTED IN BOSTON

for

THE MASSACHUSETTS SOCIETY OF CERTIFIED PUBLIC ACCOUNTANTS

March 9 - 22, 1949

Robert K. Norse
Survey Director

STATEMENT OF OBJECTIVES

The over-all objective of this survey is to ascertain the knowledge and sentiment of businessmen concerning the Certified Public Accountant and his field.

This broad objective has been divided into seven specific "areas of assessment." It is the purpose of this study to discover and measure all available and discernible inforamtion and data pertinent to the following factors:

1. The degree of professional standing of the Certified Public Accountant.
2. Difference between a Certified Public Accountant and a public accountant.
3. Reaction to the work of Certified Public Accountants.
4. Extent of Certified Public Accountants' sincerity toward clients' problems and the performance of a professional job.
5. Importance of a Certified Public Accountant's opinion on financial statements.
6. The sentiment concerning state examinations and the awarding of certificates.
7. Sources and nature of news and comments regarding Certified Public Accountants and their field.

On the basis of the above, questions were formed, pre-tested, revised, and then arranged on a questionnaire.

PROCEDURE

The Sample

A sample of one-hundred respondents was used, composed of the following characteristics:

SEX		AGE GROUPS	
Male.....	95	21-35.....	15
Female...	5	36-50.....	48
Total	100	Over 50.....	37
		Total	100

All were people in the business field and all were qualified to answer the questions on the questionnaire.

The area of the survey was Boston, Massachusetts, and its immediate vicinity.

The respondents were divided among small-, medium-, and large-sized businesses. No one size dominates the study—they are represented almost equally.

The Interview

All respondents were interviewed at their places of business. The interviewers were closely supervised throughout and governed themselves and the interviews under rules, regulations, and instructions set forth in a six-page directive written especially for this survey.

The interviewers received whole-hearted cooperation from the majority of those interviewed, although a few did give "guarded" or "cautious" answers and opinions.

On the reverse side of each ballot there appear two grades: the top one refers to "degree of cooperation of the respondent" and the bottom one to the "degree of reliability of the replies." These were privately marked just after the interview. ("A" indicates excellent, "B" good, "C" fair, and "D" poor.)

Many questionnaires contain additional comments on the back.

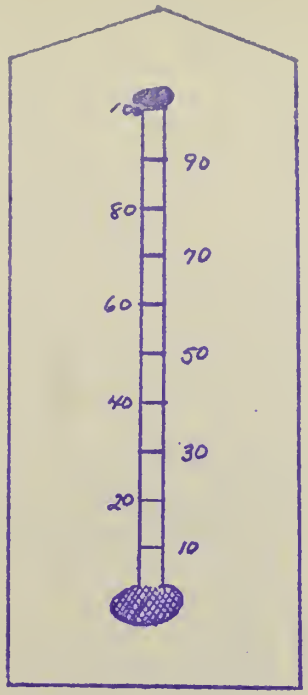
The Tabulation

All results have been double-checked for accuracy. In the case of the first question, an adding machine was used.

The presentation of the results has been specifically arranged to facilitate comparison with future surveys, either in this area or others, that follow the pattern adhered to in this project.

The following pages contain a question-by-question tabulation and presentation of the final results.

QUESTION #1



Assume this thermometer represents degrees of professional standing for various occupations. In your own, personal opinion, what would be the professional "temperature" of the following people? (The higher the temperature, the higher the professional standing of the person.)

Plumber

Medical Doctor

Corporation Lawyer

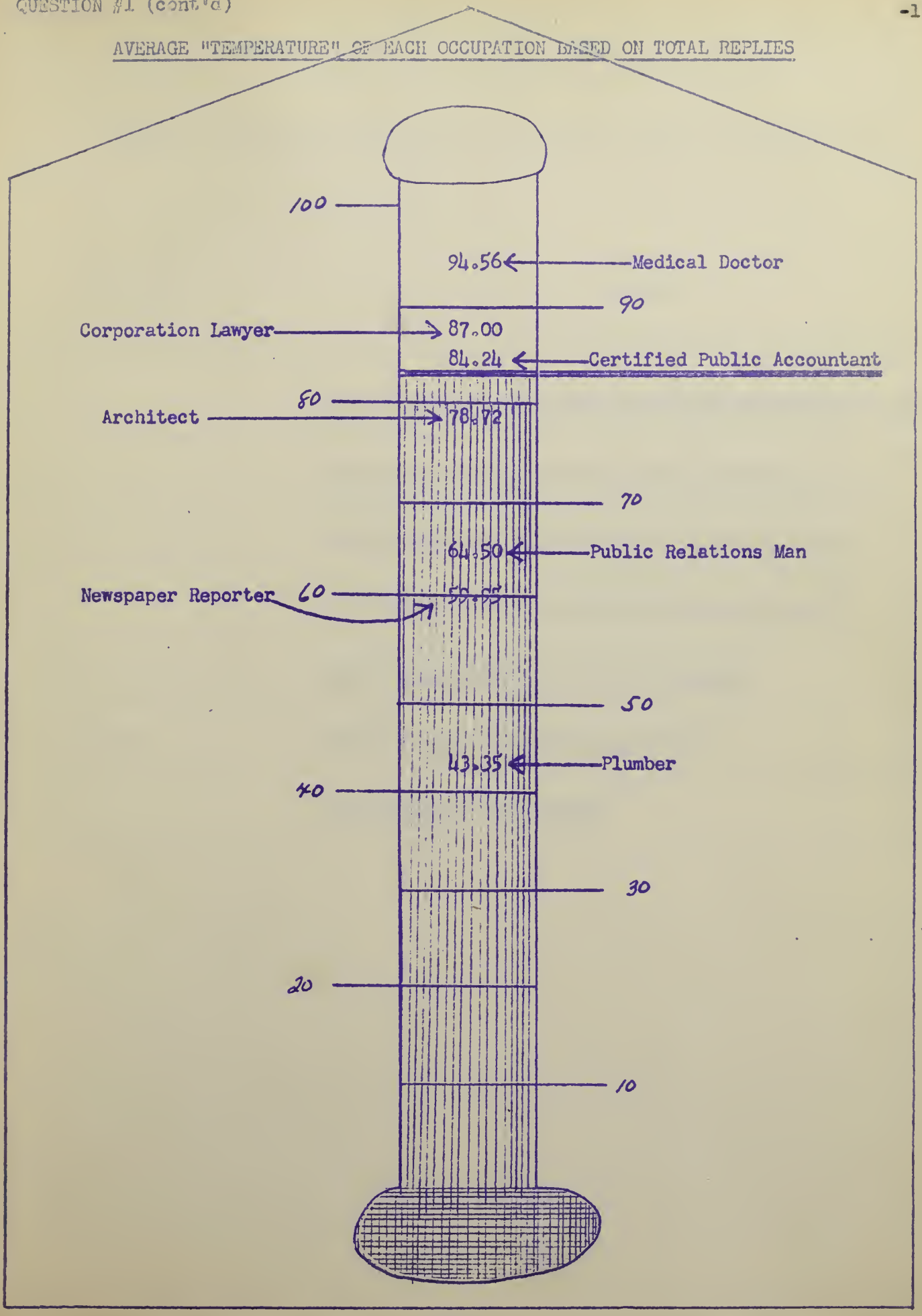
Certified Public Accountant

Newspaper Reporter

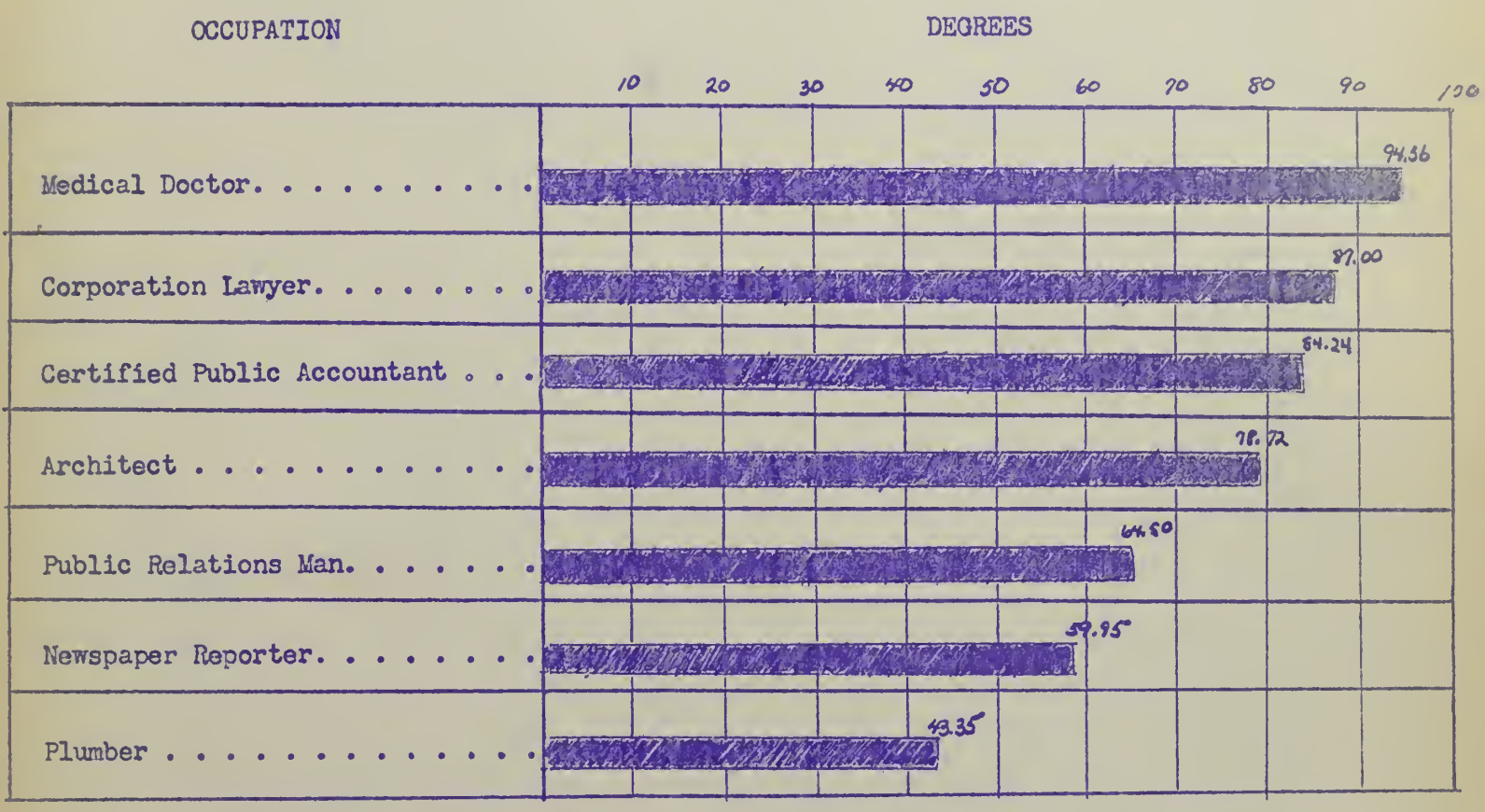
Architect

Public Relations Man

AVERAGE "TEMPERATURE" OF EACH OCCUPATION BASED ON TOTAL REPLIES



AVERAGE "TEMPERATURE" OF EACH OCCUPATION BASED ON TOTAL REPLIES



QUESTION #2

Briefly, what do you think the difference is between a Certified Public Accountant and a public accountant?

The differences mentioned by the respondents have been categorized. The numbers refer to the number of times that the differences appeared on the ballot.

(38) Ability, knowledge, and experience in the field

These people stated that the main difference lay in the fact that Certified Public Accountants were more qualified and advanced. Their training, claimed many, was much more extensive, giving them greater insight into related problems.

(35) Examination

The fact that the Certified Public Accountant had passed a rigorous, qualifying examination, accounted for the greatest difference according to these people.

(22) Certified by state

Replies such as...registered under state law...meet state requirements...qualified by state...licensed by a responsible examining board set up by the state, etc....were put into this category.

(14) Different types of work - different functions

...One is a bookkeeper, the other an accountant...similar to the difference between a practical nurse and a registered nurse...functions on a higher level and more specialized...

(13) Prestige

...more acceptable to government...public recognition...can do and make various reports required by government...has great prestige with audit concerns...

(11) Professional standing

They have much more professional integrity...a much higher standing in the eyes of others...adhere to professional ethics...

(3) Depends on the individual

These respondents claimed that the only difference was in the individual; there are some better public accountants than Certified Public Accountants and vice-versa.

(1) Higher rate of remuneration

This respondent stated that the only difference was in pay.

(1) Did not know the difference

(6) Not much difference, if any

There is noticeable duplication in the above tabulations, simply because one person may have given two or three answers.

The breakdown according to the number of persons, then, is as follows:

10 persons thought there was little or no difference, except in pay or in the individual.

48 persons thought the examination or state certificate made the difference.

20 persons believed that a certified public accountant differs from a non-certified public accountant in public recognition (prestige) or professional standing (integrity).

22 persons did not know or did not care to say.

QUESTION #3, Part A

Have you (or your firm) ever used the services of a Certified Public Accountant?

YES

NO

DON'T KNOW

QUESTION #3, Part B

If answer to Part A is YES, what was the reaction to his (or their) work?

Very Favorable

Favorable

Just Fair

Unfavorable

Very Unfavorable

Don't Know

QUESTION #3, Part A

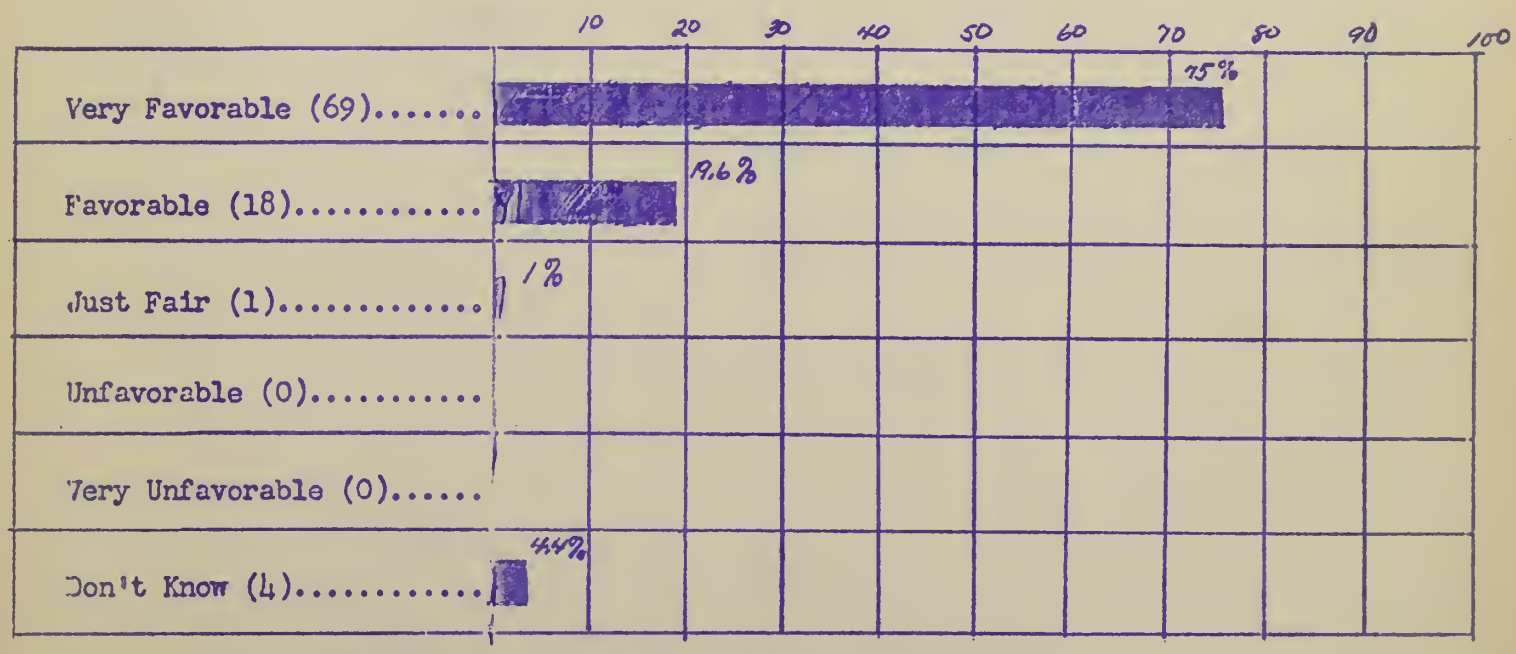
YES.....	92%
NO.....	8%
DON'T KNOW.....	0
	100%

* * * * * * * * * * * * * *

QUESTION #3, Part B

PERCENT OF EACH REACTION

(Given by those who answered "YES")



(Numbers in parentheses refer to total replies)

QUESTION #4, Part A

Certified Public Accountants, as a whole, take a sincere interest in their client's problems and try to perform a good, professional job.

Please check one:

NUMBER OF RESPONDENTS CHOOSING EACH

(Based on Total Replies)

Always	66
Usually	34
Sometimes	0
Seldom	0
Never	0
Total	100

QUESTION #4, Part B

Briefly explain your reason for the choice in Part A.

The reasons of those who answered "Always" to Part A have been summarized under five broad categories. The reasons of those who answered "Usually" have been handled in the same way on the following page. The numbers designate the number of respondents who expressed reasons applicable to that general category. They do not total one-hundred due to a few nebulous answers that precluded categorization.

ALWAYS

(30) Personal experience

These respondents agree with this statement because, in their own, personal experience they have observed it to be true...have never seen any evidence of their conducting themselves on any other basis ...they summarize their work in a report which is a great help to business; their forecast is extremely helpful...they are always alive to their job...

(15) Believe ALL professional men try to do a good job

...Personal standing to be maintained...pride and satisfaction in a good job...the reputation of the firm supplying the accountant - we don't hire an "individual," but the "firm"...

(10) Required to as a sound business policy

Good public relations...necessary to stay in business...trained to do a good job for future business...

(4) Personal interest in client's welfare

These four respondents stated that C.P.A.'s have an actual sincere interest in their clients (ideally so) and put them above all else.

(1) Fear of losing their certificates

"They have their certificates to worry about."

USUALLY

(14) There are good and bad people in all walks of life

No profession is perfect...there is always the human element...no profession always does its best...various frailties and shortcomings in human nature...

(9) Personal experience

They don't always recommend the most economic methods...weakness of assistants...from previous credit experience in a bank, accountants were not entirely efficient...know of specific instances where they have not done a good professional job...sometimes does job just to get it done...

(3) Generally takes an interest

Tries to do as good a job as possible...in some cases, just does a job because he gets paid for it...knows of cases where clients dissatisfied with the work...

(4) Too rapid work

Limitation of time requires speeded-up work and results in mistakes... some seek short cuts from real work...tries to take shortcuts just to get done quicker...

(3) Professional standing depends on it

These three respondents, although they checked "Usually," praised the C.P.A.'s for maintaining their reputation on a high level... pride and satisfaction in a good job...

QUESTION #5

Do you think an auditor's opinion is important in adding to the validity of a corporation financial statement?

Very Important.	86%
Fairly Important.	11%
Unimportant	3%
Never thought about it.	0
	100%

(Based on all of the one-hundred questionnaires)

QUESTION #6, Part A

The state of Massachusetts gives examinations and awards C.P.A. certificates to successful candidates as a mark of professional competence. Do you think this is in the public interest?

YES

NOT NECESSARILY

NO

QUESTION #6, Part B

Briefly, WHY?

QUESTION #6, Part A

PERCENT OF TOTAL REPLIES	
YES.	99%
NOT NECESSARILY. . .	1%
NO	0
	100%

QUESTION #6, Part B

The reasons expressed have been summarized under five broad categories. The numbers refer to the number of respondents who gave reasons falling into that general category. Other significant reasons are listed at the end.

(49) Proof of qualification and competence.

Guarantees a man to be qualified...in order to get accountants who aren't blacksmiths...necessary for someone to pass on the qualifications of a person who is to assume a responsible position...measures ability and knowledge...keeps the inefficient from flooding the field ...the only proven way to show the fitness of a candidate's ability..

(27) Maintains professional standards.

Signifies professional recognition....tends to raise status of the profession...puts them on a higher level...written proof of authority in the field...maintains standards...

(24) Protects clients and public.

So that those who need this service can know where they can get competent work...gives confidence to businessmen...prevents misrepresentation...trust in an impartial board...not a faker...assures his employer the best talent...protects against fraud and misleading statements...requires integrity...just as a doctor should be certified before he starts operating on or treating a patient...

(5) Necessary screening device.

Weeds out the incapable ones...a very good screening device...aids in selecting the proper ones...

(4) Qualified Reasons.

These four people all answered "YES" but qualified their answers with such statements as: the present system is not infallible, though... would prefer an independent body, rather than the state (politics) to award certificates...should be in the public interest, but isn't always...if the exams are "worthwhile" exams...

QUESTION #6, Part B (cont'd)

Other significant reasons.

Any profession must be supervised by an authorized body.

The state is the only agency which could act impartially.

There is no other medium of setting standards.

Implies verification of their integrity.

State affords opportunity for ambitious ones to reach top

The one respondent who answered "NOT NECESSARILY" explained by the question, "Who makes up the exams and rates them?"

QUESTION #7

Have you heard or read any news or comments about Certified Public Accountants, or their field, during the past year?

Name the exact source, if you remember, and indicate as "Favorable" or "Unfavorable" the nature of the comment or news.

NUMERICAL RESULTS

65 out of the 100 DID hear or read news or comments about CPA's during the past year.

35 out of the 100 DID NOT hear or read news or comments about CPA's during the past year.

100 Total

Of those 65 who DID hear or read news or comments about CPA's during the past year:---

19 mentioned hearing or reading from 1 source

16 mentioned hearing or reading from 2 sources

17 mentioned hearing or reading from 3 sources

5 mentioned hearing or reading from 4 sources

7 mentioned hearing or reading from 5 sources

1 mentioned hearing or reading from 6 sources

65 Total

QUESTION #7, (cont'd)

PERCENT OF TOTAL ANSWERING "YES" ("NO" not given)

SOURCE	YES	Favorable	Unfavorable
Newspapers	30%	25%	3%
Magazines	23	21	-
Radio	3	3	-
C.P.A.'s	31	29	-
Business Acquaintances (not C.P.A.)	44	39	5
Personal Friends and Relatives	24	22	2
Other (specify which)	6	4	2

Specific Sources

Newspapers: Three mentioned the Boston Herald (one "Unfavorable")
One mentioned the Boston Globe
One mentioned the Wall Street Journal

Magazines: The following were each mentioned once (all "Favorable") except "Journal" - twice
"Taxes"
"Business Week," under Steel
"Journal of Accounting" - tax magazine

Other: The following were each mentioned once.

Business publications (Fav.)
Tax Services Report (Unfav.) - "trying to prevent accountants from giving tax advice"
Insurance Company of America
Notice on meetings, taxes

INTERPRETATION
and
RECOMMENDATIONS

The next few pages contain what I believe to be significant about the results of each question.

QUESTION #1

The 84.24 "temperature" of the Certified Public Accountant is very satisfactory, although not as high as it could be. Close attention should be given to any changes reflected in future studies. Considering the "stiff competition," the present rating is most creditable.

QUESTION #2

Here is a "danger" signal. Only about one person in five was fully aware of the basic difference (prestige and professional standing) between a Certified Public Accountant and a public accountant; one in ten thought there was no difference, except possibly in the individual; almost half regarded the examination as the chief difference.

This suggests, quite clearly, the need for some type of educational program. Some institutional advertising in a newspaper such as the Boston Herald might explain the character and function of the Certified Public Accountant to erase the common stereotyped belief surrounding "examinations" and "state certificates."

After a reasonable time has elapsed another survey, asking the same question, would reveal the effect of such action.

QUESTION #3

Three out of every four expressed a "Very Favorable" reaction, while only one person indicated a "Just Fair" rating. This speaks very well of the Certified Public Accountant because here we have measured reactions to actual situations, not merely opinions.

QUESTION #4

Consideration should be given to the following factors involved in the results of this question.

1. One out of three did not hold the Certified Public Accountant in highest esteem - although two out of three DID.

2. One in ten was of the opinion that the selfish motive of "profit" was the underlying reason for the interest and diligence.

3. About one in six thought that ALL professional men adhere to the ideals stated.

4. Four people specifically mentioned the fault of too-rapid and hurried work resulting in mistakes.

5. Of those who replied "Usually," almost one-half realized the factor of human nature - they did not place the blame on the profession of Certified Public Accounting.

The above indicate some areas of concentration in which Public Relations could be profitably used.

QUESTION #5

The percentage of people replying "Very Important" doesn't seem to be as high as it should. When fourteen percent of a public that definitely needs and uses your service is of the opinion that it is less than "Very Important," the time has come to "tell your story." Personally, I think the "Very Important" replies should be 90% or better.

QUESTION #6

The results of this question look like those of a Russian election. 99% were in favor of the present procedure of testing and selecting Certified Public Accountants. The reasons given are most valuable in that they contain suggestion after suggestion for various "themes" that may be used in advertising campaigns, etc. For that reason alone, this should be one of the most useful parts of the survey.

QUESTION #7

Here are the "avenues of information," the channels of communicating the ideals and high principles of the Certified Public Accounting field and interpreting their policies to the public with which they deal -- YET DURING THE PAST YEAR, ABOUT ONE-HALF OF THAT PUBLIC NEITHER READ NOR HEARD ANY NEWS OR COMMENTS ABOUT THE FIELD, OR ELSE DID NOT REMEMBER ANY.

This lack of knowledge could easily become a dangerous situation. I would urge the exploration of the possibilities of a full-fledged Public Relations program to open up these channels of communication and present, over and over, a comprehensive interpretation of the functions of the Certified Public Accountant and his great worth to our modern-day society. The labor groups, for instance, have won wide public recognition and acceptance as a result of their all-out "informational program." Certainly, with the fine story the Certified Public Accountant group has to relate, it can become even more firmly established in the hearts, as well as the minds, of the American businessman.

BREAKDOWN OF POSITIONS OF RESPONDENTS

36	Managers	(sales, business, credit, etc.---3 regional managers)
21	Treasurers	
8	Vice Presidents	
7	Presidents	
6	Auditors or Accountants	
5	District Auditors or Chief Accountants	
3	Chief Clerks	
2	General Superintendents	
1	Salesman	
89		
11	Did not specify positions	
100	Total	

CRITIQUE

All in all, this survey was well above average in both degree of cooperation obtained and accuracy. The interviewers, all experienced and well-trained, performed a particularly commendable job. The people interviewed expressed reliable opinions and answers commensurate with their positions of responsibility in various fields.

It can be said, without fear of contradiction, that the objectives of the survey were successfully attained.

The results of this project serve another purpose when used as a basic "control" for other measurements of attitudes, with which comparisons may be made. It is in this sphere of concentration that the ultimate value and importance of opinion assessment is achieved.

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Date ~~Loaned~~ Due

JUL 6 - 1949		
SEP 2 6 1949		
JUL 2 6 1950		
OC 19 '50		
MR 24 '52		
AP 17 '52		
MY 19 '52		
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Nor e, Robert K.
Application of public opinion measurement principles.

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JUL 6 - 194[illegible]	Larry Fraser